

A Guide for Domestic Fundraising for NGOs in Bosnia and Herzegovina



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United Methodist Committee on Relief (UMCOR) - NGO Unit
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Introduction

A constant stream of funding or revenue is needed for all organizations to survive and prosper. Projects have to be funded, staff must be paid, running costs have to be met, and the public need to be informed of activities and results. During the last ten years, civil society organizations (CSOs) in Bosnia and Herzegovina (BiH) have primarily relied on grants from international donors for funds to pursue their missions and activities.

With this dependence in mind, in November 2003 USAID awarded UMCOR a grant to implement a two-year project titled *"Towards a Sustainable Tomorrow - Partnership, Participation and Inclusion"* to support and develop fundraising practices of selected CSOs, particularly from domestic sources; to improve the public perception of the non-governmental sector; and, generally, to encourage development of a culture of philanthropy and altruism in BiH.

The project strove to address a number of issues within the non-governmental sector in BiH, which despite progress made during the last ten years, hold constant constraints upon the sustainability of organizations and improved results. The primary issue addressed by this project is the reliance of organizations on funding provided by international donors or agencies, rather than domestic sources. This reliance has become stark, as international funding for the activities of this sector has and continues to decline.

A widespread belief that domestic fundraising opportunities are limited, combined with the availability of substantial and relatively easily accessed international funding, led BiH CSOs to focus on these international sources for funds (foreign donors and foundations and grant making implementing agencies).

The U.S. Agency for International Development (USAID) Civil Society Assessment Report of 2004¹ indicates that although there is awareness of the downward trend in the availability and level of international funding, there has been little preparation by the sector for this change. Domestic CSOs appear not well organized for effective domestic fundraising particularly as fundraising often does not appear as a core activity. The survey also revealed a lack in links between NGOs and local communities, businesses and governments that prevents these civil society organizations to build a better profile and enhance credibility with their constituencies.

Furthermore, the general public in BiH is relatively unaware of the non-governmental sector. A public survey carried out by Prism Research during the project's first year indicated that a major factor in the lack of domestic support for CSOs amongst the general public was the limited knowledge of the existence of such organizations, their missions, and activities.

¹ - *Civil Society Assessment in BiH* prepared for USAID BiH by C. Barnes, M. Mrdja, S. Sijercic & M. Popović, June 2004

The need in the sector is clear: CSOs need to establish fundraising as a core activity; continually develop capacities and plans for raising funds domestically to ensure financial sustainability as availability of international funding continues its downward trend; and work to build a stronger public profile and key relationships with their local communities, the business sector, and BiH governments.

The program's purpose was to assist selected CSOs with these issues firstly through training, then by providing opportunities for organizations to try fundraising with an emphasis on domestic non-grant funding.

The selection of the CSOs to participate in trainings and receive financial support for fundraising campaigns through sub-grants and technical assistance was made according to an assessment that examined their: previous experience in domestic fundraising; community support; capacity to succeed; cause and its appeal; and, proposed fundraising campaign strategy. The goal of the selection process was to identify organizations for which the domestic resource mobilization will not be yet another project, but a continuous institutionalized process for change and improvement.

Twelve CSOs were selected for fundraising and public relations training² in year one of the program, and these organizations were then given the opportunity to compete for the sub-grants for fundraising campaigns. The four organizations selected of the twelve were: Obrazovanje gradi BiH (Education Builds BiH); Žena BiH (Woman of BiH); Bosanske rukotvorine (Bosnian Handicrafts); and Sluh (Hearing). Results of campaigns were mixed. Two of CSOs broke even or exceeded the targeted return on investment or ROI³, and two sustained a loss. However, each organization learned valuable lessons (see Chapter 8. Observations). During the same year, three of these CSOs that were judged to have good viability prospects were given a second sub-grant for implementing another fundraising campaign.

In the second year, eight CSOs participated in the same trainings, and five were selected and provided fundraising sub-grants, namely Centar Humanitas (Center Humanitas), Udruženje Bona Fides (Association Bona Fides), Savez udruženja slijepih građana Tuzlanskog kantona (Union of Associations of Blind Citizens of Tuzla Canton), Humanitarna organizacija 'Partner' (Humanitarian Organization 'Partner', and Udruženje roditelja djece i omladine s poteškoćama u razvoju 'Sunce nam je zajedničko' (the Association of Parents of Children and Youth with Special Needs 'Sun Belongs to All'). The results of campaigns improved, as three of five organizations either broke-even, achieved or exceeded the targeted ROI.

The twelve different fundraising campaigns implemented by these nine organizations raised a total of 416,758 KM. This suggests that domestic fundraising in BiH has the potential to succeed and for CSOs to seriously consider and develop these sources in an increasingly competitive funding environment. While the economic situation in the country is far from ideal, there are opportunities to develop a supportive public, exploit a strengthening corporate sector, and approach governments with strong reasons for support from the public purse. Additionally, the benefits of domestic fundraising activities are not purely financial, as these are opportunities for

2 - Trainings were provided by the Civil Society Development Foundation Hungary (CSDF), www.ctf.hu

3 - The targeted ROI was 1.5 i.e. for every 1 KM invested in the costs of the fundraising campaign the aim was to raise 1.5 KM in return.

an organization to build legitimacy and support from its community or constituency.

The results of the first year supported the idea that a fundraising guide might be useful to broaden the reach of the project. The purpose of the guide is not to be prescriptive or comprehensive - if this is even possible on this topic - but is to give suggestions and relate experiences gained during the program. More importantly, we hope that it may inspire other civil society organizations in BiH to explore domestic non-grant funding opportunities in order to build a healthy mix of funding sources for future sustainability.

The guide is divided into sections on the key principles of fundraising: preparations, funding sources, techniques (non-grant fundraising techniques), public relations and communications, and campaign following-up. Where possible, the experiences of the NGOs that participated in the program are used to illustrate the subject. Data is provided from the fundraising campaigns implemented by the participating organizations that may be useful for benchmarking future efforts. All of the forms included as worksheets are provided ready to use on the enclosed CD.



Chapter 1.

Key Principles of Fundraising or DO's and DON'Ts

Fundraising..... "the organized activity of soliciting and collecting money for a nonprofit organization"⁴

A minimum level of funds is required for any civil society organization to maintain a sustainable presence in your community and achieve its mission. Ensuring that fundraising is a day-to-day activity will go a long way towards making your organization a success. Raising funds from multiple and diverse sources will enhance independence, credibility, and build a broad base of support.

Fundraising, at best, is not an activity limited to receiving money from donors. It is ideally seen as a much wider organizational process that includes a whole range of activities, which together contribute to maximizing the success of fundraising.

Typically such wider activities include:

- Strategic planning that integrates all activities;
- Defining the "brand" of your organization;
- Communicating an identity and a mission;
- Promoting activities, results, and beneficiaries; and
- Building the right staff structure, including volunteers.

While winning financial resources is the key specific output of fundraising activities, it is important to keep in mind that fundraising is not the ultimate goal in itself, but a strategy to realize the organization's mission and long-term strategic plans. Fundraising efforts and methods are normally best when they fit well with your organization's mission and strategic planning.

Before embarking on fundraising efforts or a campaign, it is always beneficial to double-check that staff and members have a good understanding of your organizational mission. Likewise, taking time to know and understand your constituent community is important, as this knowledge will be used when deciding the type of fundraising techniques to use and how best to approach this community when asking for money or support.

For all organizations, large or small, fundraising is a complex and demanding activity that requires a great deal of hard work, time and energy. It is easy to be disheartened when your fundraising campaigns are not as successful as hoped, or when your profile in the community is not as high as you would like.

There are some basic principles that will help whenever planning fundraising efforts or a specific campaign:

DO'S:

YOU HAVE TO ASK! This is a simple point, but the majority of people who have not given money say the reason for this is that they have not been asked to give.

DEFINE YOURSELF! A clear definition of your organization and its mission amongst your constituent community, including your own staff, is key to developing lasting support. This is often called branding and involves creating a clear organizational identity - this is the mission, the activities and how these are communicated (a recognizable visual image, consistent messaging, etc.).

KEEP APPROPRIATE PROFILE! It is important to keep an organizational profile that is appropriate with your organization's mission. A profile that is not in keeping with your work can deter your current and potential supporters.

PROMOTE YOUR WORK! When you have a clear organizational identity or 'brand' tell the public about your work and how successful you are....This will help inspire your community to give when asked.

GET ORGANIZED! Fundraising requires a good knowledge of potential supporters, efficient use of staff, volunteers, resources, time, and a well-thought-out fundraising action plan. All of this requires good organization to work well.

FOCUS ON SPECIFIC PROJECTS! It is very often easier to raise money for a particular project than for the general work of your organization. By focusing on a particular activity, you may show donors and supporters how their money will have a tangible effect.

TAKE A PERSONAL APPROACH! People respond better when they are personally engaged by your message and request for funds to support your mission. Make your message trigger a personal response; and, if you have time, approaching supporters or the public in person may be more effective than telephone or direct mail.

THANK YOUR DONORS! Recognizing and acknowledging your supporters and donors is good practice. It shows that you value their contribution, and it encourages them to give again in the future.

BE ACCOUNTABLE & TRANSPARENT! Accountability to donors and supporters is not just a good fund-raising practice, but also a prerequisite for a sustaining long-term fundraising success. Ensure that the money you raise is used for the purposes that you advertised, and show the public what the funds raised have achieved in activities and results.

DON'TS:

LEAVE PLANNING TILL THE LAST MINUTE! Supporters and donors will not be impressed if your planning appears to be hasty and incomplete. A complex fundraising campaign requires detailed planning well in advance.

REPEAT THE SAME FUNDRAISER! Often it seems easy to employ the same strategy and plan the same events time after time. At times this institutionalization may be beneficial; however, it is important to consider keeping your approach fresh to maintain the interest of your supporters, staff, and volunteers.

FORGET ABOUT YOUR VOLUNTEERS! Recruitment, retention, and the support of quality volunteers is often vital for successful fundraising, as they may provide tremendous assistance at a low cost. So, treat them well, and make sure they know their roles and responsibilities and how much time you need from them.

FUNDRAISE TOO MUCH! Be careful of "donor fatigue," particularly if you operate in a small community. Too many fundraising events or a campaign that lasts too long may saturate the market and burn out your supporters and staff.

HAVE FUNDRAISERS THAT CONFLICT WITH OTHER EVENTS! Pay attention to what others are doing in your area so that you do not schedule events for the same time. Holidays, community, and sporting events are also worth watching out for.

FORGET TO EVALUATE YOUR CAMPAIGN! Every campaign, no matter how successful, will have lessons to learn for next time. Make sure that you use the opportunity to analyze what went right as well as wrong, and how your organization can improve.

FAIL TO CONSIDER THE ENTIRE COST! If possible, it is advisable to try to budget a "reserve" or "contingency" amount to cover any unplanned or emergency expenditures that arise during the campaign.

Chapter 2.

Fundraising Planning or 'Get a Strategy'



At best, all planning starts with organizational strategic planning. While this guide is not about strategic organizational planning, it is harder to do effective fundraising without having done this first. Therefore, it is advisable that before launching into fundraising planning, do a double check of your strategic plans.

Normally a strategic plan should cover at least three years and identify your priorities, your strengths and weaknesses, and the future course of your organization. For a short overview of a typical strategic planning process see Worksheet 1. Strategic planning will determine your long-term goals and set your priorities for which you will require funds, and then will help guide your fundraising efforts by:

- (a) Giving them a clear focus around your strategic mission; and
- (b) Clarifying which may be the most appropriate financial sources to target that will identify with your strategic mission.

The organizational strategic plan will determine the current financial needs or objectives of your organization that will become the fundraising target; i.e., back to "projects should be funded, staff must be paid and running costs have to be met!"

As your strategic plan will typically be mapped out for a minimum of three years, your financial strategy must mirror this same period. Financial strategy is important because:

- It creates a framework for all financial and fundraising activities;
- It assists you in developing specific action plans for annual fundraising strategies;
- It will help you set clear goals in diversifying your donor base; and
- It helps the organization set priorities and focus on its long-term purpose.

For a typical three-year financial strategy format see Worksheet 2:
Three-Year Financial Strategy.



Once annual fundraising targets are defined within the three year financial strategy, it is time to focus on the fundraising target of the forthcoming year. Using the table below, you will be able to identify the gap between the amount of money you have and the funds you need. This gap will be your annual fundraising target.

Expenses	Income
Program costs: <ul style="list-style-type: none"> • Projects 	Grants - Proposal: <ul style="list-style-type: none"> • •
Operational Expenses: <ul style="list-style-type: none"> • Salaries • Rent • Office Supplies • Promotion/FUNDRAISING 	Own income: <ul style="list-style-type: none"> • Membership • Service fees • Bank interest
Total expenses projection:	Total income projection:
	Income - Expenses = Surplus/Deficit
	Deficit = Fundraising Target
	FUNDRAISING TARGET

For a fundraising target worksheet template see Worksheet 3.

After identifying your annual fundraising target, it is time to create a fundraising calendar where you will plan your fundraising activities during the year and set income goals for each event. Your fundraising calendar⁵ can look as follows:

5 - Adapted from M. Warwick and S. Hitchcock, *Ten Steps to Fundraising Success: Choosing the Right Strategy for Your Organization*, 2002: 96-97.

Fundraising Technique	Months												Total from the technique
	January	February	March	April	May	June	July	August	September	October	November	December	
Technique 1 and activities													
Technique 1 (income goal)													
Technique 2 and activities													
Technique 2 (income goal)													
Technique 3 and activities													
Technique 3 (income goal)													
Planned to be raised from the technique(s) per month													
Grand total planned to be raised	FUNDRAISING TARGET												

For a fundraising calendar template see Worksheet 4:
Fundraising Calendar.

Market research

It is recommended to conduct some basic market research to help determine how you will raise funds and from whom. See Worksheet 5 for a pre-fundraising campaign questionnaire that can assist you to determine:

1. Your community's perception of the importance of the need or cause for which you propose to raise funds;
2. Feelings, both positive and negative, about your organization and its mission;
3. Size of your potential donor base and its ability to give;

4. Availability of strong campaign leadership and effective volunteers;
5. Internal resources available for the campaign and the preparedness of the organization to undertake the effort; and
6. External factors that could influence the outcome of the campaign.

Key issues for campaign planning to address

After mapping out your fundraising year and identifying the periods for specific fundraisers, it is time to start detailed planning. Before you begin detailed planning, it is advisable to start by considering the following key issues to double check your initial thinking:

- | | |
|----------------------------------|---|
| 1. Goals | What are the key organizational and financial goals - fundraising targets of the campaign, and are they realistically achievable? How does your campaign meet the needs of your annual budget? What is the target "return on investment" (ROI) for your campaign? |
| 2. Campaign Resources | What level of resources are you able and willing to commit to the campaign, and how long can the campaign be sustained? Staff - Who will lead your fundraising team, and which staff will be in support? What is the role of volunteers? |
| 3. Sources of Funds | Donors - What are the potential sources of funds or who will give? Do the profiles of current donors fit with the fundraising techniques you plan to use? How do you intend to attract new donors to your cause? |
| 4. Fundraising Techniques | What type of techniques do you plan or think will work? Events and which specific type(s)? Membership? Personal contacts? Direct mail campaign? Phone-a-thon? Etc.? How feasible are they? |
| 5. Publicity/PR - | How will you present your campaign to the public, and which target group will you aim for? What types of media - television, radio, newspapers, leaflets - will you use to get your message across? |
| 6. Assessment/ Follow-up | How will you assess the progress and success of the fundraising plan, both during and after the campaign(s)? |

It is worth emphasizing once again that your campaign plan should be designed so that it fits neatly with your mission and your overall fundraising strategy. You should take into account the fundraising potential of the community in which you live, as well as the capabilities of your organization and staff. Failure to devote sufficient attention to the planning of your campaign means that the time and effort devoted to it is likely to be wasted.

No matter the size of the fundraising campaign, it is always beneficial to consider it as a project and to write a proposal for the campaign. This will help you to ensure you have defined activities, resources and allocated responsibilities; and provides a checklist to make sure you have considered all the issues that may influence the success of the campaign. For a typical proposal format see Worksheet 6: *Fundraising Campaign Proposal* template.

Chapter 3.

Campaign Resources or 'What have you got?'

Marshalling the resources that an organization has or may use is key to executing and succeeding in your fundraising campaigning. Analyzing the resources that an organization has available should include:

- Identifying your funds available for the fundraising campaign(s);
- Establishing a maximum budget for the campaign(s);
- Allocating the staff available including the volunteers if applicable;
- Checking availability of other assets needed like office space, IT equipment, vehicles, etc; and
- Readily available data and information on various aspects of your organization like beneficiaries; membership; previous and current activities, accomplishments, lists of supporters, media lists, financial figures, etc.

Funds

Funds need to be set aside in your Annual Budget as part of your financial strategic plan to pay for the implementation costs of your fundraising campaign(s) in any given year. These funds are supposed to cover the costs associated with your fundraising efforts/campaigns. It does not always take money to make money, but not spending money where it is really needed can negatively impact your results.

The funds invested in fundraising efforts are expected to bring a financial return for your organization higher than the amount you spend. The amount raised after expenditure is known as "return on investment," or ROI. An organization's will consist of the working capital, physical assets, and people's time spent on fundraising. Investments consist of:

- Up-front expenditures required;
- Costs associated with the assets that are utilized;
- Value of staff/people's time spent working on the fundraising effort.

ROI varies greatly due to many factors such as: the type of fundraising activity, the characteristics of the organization itself, the cause, the financial strength of the community/market targeted and so on. Overnight success is not always possible, and it may take timer for the various types of fundraising to mature and increase in cost effectiveness (e.g., it costs more to recruit a donor than to retain them).

Prior to making final decisions on the fundraising techniques to use, analyze the input expenditures for the particular technique versus the anticipated net gain. Obviously, do not spend your resources if nothing is actually going to be gained.

KEY EXPERIENCE

During the Project Campaigns a target ROI of 1.5 was used (for every 1 KM spent 1.5 KM was raised). The 1.5 target was established based on the assessment of the fundraising return on investment for non-for-profits in the developed countries while considering the BiH socio-economic landscape.

The average ROI for twelve fundraising campaigns implemented during 2004 and 2005 was 1.43 where:

Four campaigns exceeded 1.5, and the average ROI of those that exceeded 1.5 was 2.5;

Four campaigns broke even earning more than 1.0 but less than 1.5 and the average of these campaigns was 1.21;

Four campaigns sustained losses and averaged a ROI of 0.74.

Budget

Planning your budget for your campaign will be part of the process of drafting fundraising project proposals. Budgeting is not only establishing an estimate of the cost of a campaign, but also planning these costs within the funds that are available. It is also a key tool to use during the implementation of the campaign to check that things are "on budget" and when assessing the results of your campaign: "Were you under or over budget? And if you were over, where will you find the funds to cover these additional expenses?"

For an example budget template see Worksheet 6 in the Fundraising Campaign Proposal template. A budget may be as simple or complex as you choose, according to the size and complexity of both your organization and the proposed campaign. It is advisable to start from a simple budget format that includes all the main categories of likely expenditure. These are normally the following:

- Design costs (e.g., graphic design for leaflets, etc.);
- Production costs (e.g., copying and printing);
- Communication costs (e.g., radio broadcasts, etc.);
- Transport (e.g., moving staff, equipment, materials, etc.);
- Rent of premises/equipment (e.g., concert hall and audio equipment);
- Administration costs (office supplies, office equipment maintenance);
- and
- Staff (salaries, per diem, etc.).

The budgeting process is a dynamic one, as more anticipated items of expenditure become needed or obvious as you continue to plan. If possible, it is advisable to try to budget a "reserve" or "contingency" amount to cover any unplanned or emergency expenditures that arise during the campaign and that may not be covered from planned budget items so that you do not have to search for such funds after the campaign is over.

Human resources

Organizing each resource for a fundraising campaign is key for success; and prior to almost any activity, it is important to allocate and organize your staff and other personnel you may need, such as volunteers, board members or supporting community groups. Fundraising campaigns require a team effort and full engagement and support of paid staff, board members, volunteers and other supporters.

The relationship among all these different people is crucial to the success of your efforts and time is well spent:

- Communicating effectively the goals and activities of fundraising;
- Having clear expectations of roles and responsibilities;
- Acknowledging the value placed on all those engaged and contributing.

Your board of directors can play an important role in your fundraising. The three most important characteristics your board members can contribute in support of fundraising efforts are to be known, committed and sufficiently knowledgeable about the organization to be able to answer detailed questions. Board members should know the big picture of the organization's fundraising strategies and how they fit into it.

Board members can contribute by:

- Using their personal and professional connections to open key doors to leaders, supporters and opportunities in your community;
- Attend meetings with the potential leaders, donors, and supporters that they know;
- Attend events organized by the organization.
- Making a gift according to their means. Every board member should be prepared to make a gift - and they should be the first to give;

KEY EXPERIENCE

It is interesting to note that those organizations that participated in Project Campaigns whose board members were active participants in the campaigning all exceeded the target ROI of 1.5.

The leadership for a fundraising campaign is also crucial for success. Few organizations in BiH have the resources to employ a specific fundraising manager either on a full-time or part-time basis; however, appointing a specific staff member as a leader is advisable. By assigning an employee the role of "fundraising manager" or a similar title to direct the preparation, implementation, and follow-up period of the campaign, a line of authority will be established for implementing the fundraising activities. The fundraising manager should have sufficient expertise in the field to plan, implement, and assess campaigns, as well as to competently and positively represent your organization to your target audience (public, donors, government, etc.)

While optimally there will be the right leader for the fundraising in your organization, all members of staff will have roles to play in fundraising, as they constantly represent your organization to the public. Before starting a campaign, all staff/volunteers should be thoroughly briefed on the goals and the techniques to be used so that they may effectively represent the campaign to the public whenever required.

SCENARIO

"A reporter jumps out from behind a bush and sticks a microphone in your face and demands: what is the reason for your concert on the weekend and how are you going to use the money you raise from ticket sales?"

Once staff is allocated, activities organizing them and their specific tasks are the next step. Making and recording a clear division of tasks with a time frame for completion will help you get things done more efficiently. This allocation of tasks can be part of the fundraising project plan and is one initial way of organizing your human resources. For a useful tool for staff and task planning see Worksheet 7: *Staff Planning*.

Finding a 'face' to represent you, especially during the fundraising campaign, can also be very beneficial for your organization, particularly for better visibility. Therefore when assessing your human resources for the fundraising campaign it is advisable to think of local celebrities - particularly a relevant celebrity with direct experience of the problem - that could support your work and contribute to the success of your campaign.

KEY EXPERIENCE

Bosanske rukotvorine based their initial public auction on the use of prominent celebrities from cultural and political life such as Mr. Fehim Skaljic, Mayor of Old Town Sarajevo, Ms Lidija Topic, Deputy Foreign Minister, Ms Ljerka Maric, Minister of Finance and Treasury, Tanja Soljic and Minka Muftic, Sarajevo actresses. The High Representative Paddy Ashdown was the auctioneer for the event. The event, which opened their campaign, brought considerable media publicity and eased communication with the targeted potential donors for the campaign.

Very few civil society organizations can exist without the help of their volunteers. As most BiH CSOs can only afford a small permanent staff, the assistance of volunteers is vital not only for the core work of the organization, but also for planning and organizing fundraising campaigns. The presence of volunteers in your organization is important not only for the tangible help that they provide, but also for the genuine links they provide with your community. Such links are vital for your long-term sustainability and public profile.

Volunteers can perform many different roles in your fundraising campaign. They can be engaged in collections, organizing events, contacting local businesses for sponsorships, selling tickets for events, or handing out promotional materials of the organization, and so on.

Your existing staff and volunteers can provide a base upon which to build an expanded pool of volunteers you may need for a campaign - their friends and family could also be persuaded to help to create an extended "organizational family." According to a survey on volunteers working for BiH organizations, these two social groups--family and friends--are the basic social groupings that help recruit volunteers⁶. Once you have a sufficient number of volunteers, plan their time carefully. It is ideal when conducting volunteer task planning to take into consideration their specific abilities and the amount of time that each can realistically commit.

It will be much easier to engage and retain volunteers if your organization has a commitment to volunteers and established policy to take care of them. The steps below can help your organization establish an effective volunteer support.

Steps to achieve effective volunteer support⁷:

1. **Define your organizational volunteer commitment and philosophy** - about volunteer involvement by writing a volunteer policy (integrate them in the organizational structure by regular volunteer meetings, inclusion in decision making, etc);
2. **Define tasks or assignments** - where goals, objectives and responsibilities are clear and understood;
3. **Recruit with a plan** - target appropriate audiences to recruit from and those who are truly interested in the project;
4. **Provide appropriate orientation and training** - introduce the volunteers to the organization, its mission and programs, organizational framework and codes of conduct. Provide the specific project training and support for volunteers that are necessary to develop needed skills and complete the set assignment.
5. **Acknowledge their work** - acknowledgment of the work of volunteers both internally (within the organization) and externally (publicly) is vital for recruitment and retention. Use all opportunities (events, media opportunities, annual reports) to recognize their support and thank them for work.

6 - *Volunteering in Bosnia and Herzegovina*, A Survey on Volunteerism in BiH Organizations prepared for UNV BiH by Azra S. Kacapor, MSc, November 2002

7 - Adapted from the *Canadian Fundraiser* www.charityvillage.com/cv/research/rvol16.html



6. **Evaluate volunteer programs** - evaluation will provide guidance to volunteers and staff and opportunities to improve service to both.

The same survey on volunteerism in BiH organizations concludes that:

*"...people in BiH are interested to volunteer and to be involved in the life of their community. However, it is imperative for government and NGO sector in BiH to reshape and invent new ways of attracting volunteers, providing them with necessary support in carrying out their actions and creating the policies for their involvement..."*⁸

KEY EXPERIENCE



All civil society organizations in Bosnia and Herzegovina will benefit from improved clarity regarding the engagement of volunteers when the *Law on Volunteers for BiH* drafted by a working group composed of representatives of local NGOs and international agencies is passed by the government. The new law seeks to create an enabling legal environment for volunteers who are currently not formally recognized by employment authorities in BiH.

In June 2005 the draft law was submitted to the BiH State Ministry for Civil Affairs in anticipation that it will be presented to Parliament for reading and adoption, but as of October 2005 this has not occurred.

Information

Everyone involved in your campaign will be well-served by having easy and fast access to accurate and complete data on various aspects of your organization such as: beneficiaries; membership; previous and current activities, accomplishments, lists of supporters, media lists, financial figures, and so on. Such information will assist fundraising when presenting your organization image and answering questions from the public.

To ensure that such information is readily available when needed by fundraisers, it is worthwhile to invest time to organize a well-maintained and accessible system of archiving. Digital records stored on computers are normally better, but humans still need to organize these. Even if this is a task that has been put aside and postponed to be sorted out later, making sure to do it before you start your fundraising effort is advantageous.

Building and Maintaining a Donor Database

When preparing for a particular fundraising campaign or at any time in your fundraising year, it is vital that you have as much information as possible on sources or potential sources of funding.

⁸ - *Volunteering in Bosnia and Herzegovina, A Survey on Volunteerism in BiH Organizations* by Azra S. Kacapor, MSc for UNV BiH, November 2002, p. 29

If the number of your regular donors is rapidly increasing, your organization will benefit from collating information on them in a donor database. For a template of a donor database see Worksheet 8: *Sources of Funds*.

There are many commercial computerized databases available ranging from simple models that are often freely downloadable from the internet, such as <http://organizenow.net/odb/odb.php>, to more complex and expensive versions that can be tailored to the needs and specifics of your organization. With such an array of options, your organization should be able to find a database system that matches your needs and price range.

A good database system should have the following features:

1. Fast, accurate, and complete information processing to ensure that your records of donations are kept up to date;
2. The ability to put donors into subsets;
3. The ability to give performance reports on your fundraising campaign;
4. Variable output options so that the information can be displayed in a number of different ways;
5. The option to store extra information on donors;
6. Fast access to details on past donations;
7. An archive capability for details of lapsed donors and previous campaigns;
8. Security to prevent your information being used in an unauthorized manner

There are two types of information that you can store in your database. The first is 'hard' data, which includes basic information such as the donor's name, contact details, how much money they have given in the past, and their policies on donations. The other type is 'soft' data, such as the details of your previous experiences with the donor, their interests and/or values, their constituencies and the particular issues of most concern to the donor. Such information helps you to build a more complete picture of your donors so you may target them more effectively. For example, if you know a donor has children, they may be more willing to help with fundraising campaigns for education or children's health.

As you may see from the example database in Worksheet 8, a color coding system will help to classify your donors into specific sources, which will enable you to track interest of different types of donors (individuals, businesses, institutions) in your organization. You can adapt the color coding system to help you classify your donors into categories such as those who give large amounts, or those who donate on a regular basis and possible future donors. This helps you to find the information you need as rapidly as possible. It is also crucial that the database is kept up-to-date and that staff understands how important it is to keep information as fresh and accurate as possible. Once you have your donor database, you can begin to plan a fundraising campaign that retains existing donors and attracts new ones.

Chapter 4.

Sources of Funds or 'Who gives the \$\$\$?'

Identifying who in Bosnia and Herzegovina you will plan to target to ask for funds is a vital step when planning your campaign. There are a variety of potential donors, although most fall into one of five broad groups. While there may often be overlapping between these groups, they may be characterized as follows:

- Individuals;
- Governments;
- Businesses or corporations;
- Foundations; and
- Internationals.

Each type of donor or potential supporter within these groups will have their own characteristics and will often require a different approach for success. It is advisable that your fundraising plan takes into account the different characteristics for each funding source and sets targets for the anticipated contributions you hope to achieve from each of them.

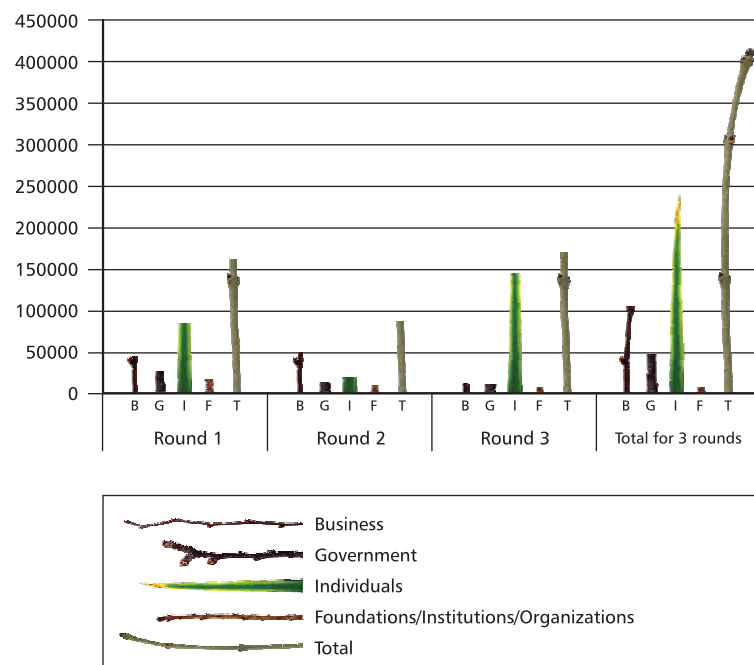


Diagram 1: Sources of Funds Raised in 2004-2005 Campaigns

Individuals



KEY EXPERIENCE

During the implementation of the Project Campaigns, a total of 416.802,80 KM was raised where 57.88% or 241,272 KM was collected from individual citizens of BiH. See the Diagram 1. Sources of Funds Raised in 2004-2005 Campaigns for a breakdown of the different sources of funds that gave during the campaigns.

Individuals are the main source of funding for charitable organizations in many countries, and this was confirmed during the 2004-2005 campaigns in BiH. Individuals are much more flexible and spontaneous in donating money than businesses, governments, and foundations. However, you must carefully target your campaign to appeal to certain groups of people who are most likely to support you. For example, often, young people are more likely to support environmental and arts campaigns, parents tend to support children's charities, and older people are more likely to donate to healthcare organizations. Those affected by the particular issue addressed by your organization are also more likely to help. It is also essential not to overlook your existing individual supporters. Once again, a good database will make a big difference in this job.

Simple market research into the type of people who support your organization will prove valuable in planning your campaign, as different groups will respond better to different types of appeals. The amount of financial support will also vary depending on the economic position of your potential supporters, and this should be taken into account when deciding what level of donation to request. Your message and presentation should be tailored to your target group, and the method of reaching them - whether by radio, television, newspapers, posters or flyers - should take into account their habits and interests. For example, a radio or television campaign targeted towards older people should feature adverts during the daytime rather than later in the evening.



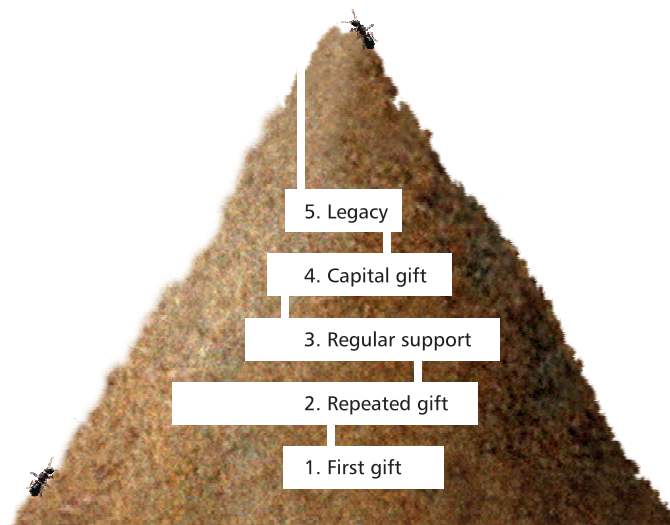


Diagram 2: The Pyramid of Individual Donors⁹

While individual giving in BiH appears primarily limited to the lower three levels of this diagram, many successful civil society organizations around the world strive to achieve the movement of individual donors through different phases of giving, as described in the Diagram 2 from the bottom towards the top of the pyramid. This is a process that could take many years and requires considerable investment in communications and donor management. Follow-up phone calls and letters that thank donors and encourage their interest in you are activities fundamental in this regard. They show your supporters that they are valued. Your investment may not pay off immediately, but will prove to be effective in the long term as your first-time givers become regular, then committed donors.

Governments - Local and National

KEY EXPERIENCE

During the implementation of the 2004-2005 Project Campaigns, 11% or 45,993 KM was raised from government sources. See the Diagram 1. : *Sources of Funds Raised in 2004-2005 Campaigns.*

9 - Adapted from James M. Greenfield, *Fundraising Fundamentals: A Guide to Annual Giving for Professionals and Volunteers*, 1994.

The potential for reasonable levels of funding to be won from governments in Bosnia and Herzegovina exists. This potential is likely to increase as governments move away from service provision to contracting services from other providers. Government partnership with NGOs for the provision of services has become an accepted mechanism in many countries, particularly for social and certain education services.

However, funding from governments may be problematic for other more generic reasons, particularly in situations where standards of public financing are not well developed and where application procedures and selection decision making is not structured and transparent. Unfortunately, this appears to be the case in BiH.

In BiH, municipal, cantonal, entity and state governments are potentially important sources of funding for many civil society organizations. However, currently it is difficult to find out what level of funding is available to civil society organizations and what mechanisms exist to regulate how to apply for funds and how these funds are subsequently awarded.

Currently, it appears that cooperation between government and CSOs--working in partnership with and providing funding for CSOs--is most operational at the municipal level (particularly in municipalities such as Sarajevo, Gradacac, Tuzla and Lukavac).

In the recent survey conducted by USAID, 42% of CSOs received some sort of financial support from their local municipality.¹⁰ The level of municipal cooperation varies around the country, as some municipalities lack effective strategies for working with CSOs. At canton, entity and state level, the links between CSOs and government are more tenuous, and there is little evidence of a coherent governmental approach to the non-governmental sector in terms of funding. However, this lack of organizational structure at a governmental level should not deter organizations from soliciting funds or support: as said many times before, "if you don't ask you don't"

Currently, bodies within the NGO community in BiH that may be able to assist with issues related to government funding or coordination are:

- Tuzla Reference Group (www.rgtuzla.org)
- NGO Council through ICVA (www.icva-bh.org)
- Coalition 'To Work and Succeed Together' (www.zajedno.ba)

Factors outside the control of the non-governmental sector, such as the political climate or the economic situation, may have an adverse effect on the funding you receive. This makes good research on current political priorities and personal contacts within government structures important. Another danger is that CSOs risk being used for political purposes by governmental elites and accepting funding from governments may reduce the independence of a CSO¹¹.

10 - *Civil Society Assessment in BiH* prepared for USAID BiH by C. Barnes, M. Mrdja, S. Sijercic & M. Popović, June 2005

11 - As an example of actively maintaining independence from government actions note that during the NATO led bombing campaign against the Former Republic of Yugoslavia the Nobel Peace Prize winning international medical relief and emergency organization Medicins Sans Frontieres refused funds from NATO countries in order to maintain their independence from the military action.

International

CSOs in Bosnia and Herzegovina have developed a reliance on international funding over the last decade due to the state of the country immediately after the end of the war combined with a perceived lack of domestic donors and readily available and easy to access international funds. Crises in other parts of the world are drawing international attention and support away from BiH, and donor fatigue with the country ensures the amount of international assistance will continue to fall. However, many opportunities for obtaining grants from international donors, agencies, embassies, foundations, and so on, will likely remain available. While funds from international sources are not considered "domestic," they are part of the market.

Grants from international organizations are usually given for specific projects, and it is rare that these are provided for the general work or operational costs of an CSO. It is imperative to research the "grant-makers" carefully, and tailor your project to their interests or the call for proposals for projects. Most grant-makers will have a formal application process that may take at least several months, and often longer.

A further point to note is that a reliance on international organizations for funding does leave a CSO in Bosnia and Herzegovina dependent on outside actors. Moreover, some overseas funding may even come with a political agenda attached. For long-term sustainability, independence, and health of the BiH not-for-profit civil society sector, increasing domestic fundraising is a must.

Businesses and Corporations

KEY EXPERIENCE

During the implementation of the Project Campaigns, 24.50% or 102,109 KM was raised from businesses and/or corporations. See the Diagram 1. : *Sources of Funds Raised in 2004-2005 Campaigns*.

Corporate social responsibility (CSR) has become an increasingly publicized concern of the business sector, where benefits or profit gained is balanced against the costs of achieving those benefits¹² and the sector is held accountable for "any actions that affect people, their communities, and their environment".¹³ To offset effects, or create a balance, business increasingly contributes material and human resources for activities that support and enhance community development. Obviously, positive corporate publicity is another advantage of these efforts.

12 - James, E. Post et.al; *Business and society*, 1996, p.37

13 - IBID, p.37

Corporate social responsibility is often broken down into four levels:

- The first is known as *"ad-hoc giving,"* where businesses do not have a donor strategy, and NGOs are dealt with on the basis of personal contacts and one-off requests.
- The next level is known as *"pragmatic self-interest,"* where support of NGOs by business is seen as a method of building corporate profile and, therefore, sales. Support on this level is most common through the sponsorship of major events.
- The third level is known as *"enlightened self-interest"* or *"corporate citizenship"* where businesses plan well thought out strategies and policies on giving and other forms of community involvement (e.g., social investments, provision of pro-bono services, etc.).
- The fourth level is known as *"corporate social responsibility,"* where businesses show their commitment not only through specific community programs, but also incorporate socially and environmental responsible practices as part of core activities.

Based on the experience from the Project Campaigns, it seems that most of businesses in BiH that give to the not-for-profit sector fall into the first and second levels.

The current tax environment in BiH retards the development of greater corporate social responsibility, as tax deduction mechanisms do not exist for charitable giving. On any financial donation of over 0.5% of gross annual income/revenue, companies are obliged to pay a tax of 30% on the value of donations¹⁴.

The social responsibilities seem to be a part of corporate culture of international corporations such as Coca-Cola, Raiffeisen Bank, Hypo Alpe Adria Bank, Merkur Insurance, DHL, etc. However, there are some domestic companies that are providing support to some NGO events, such as Akova Group that supported the Run Against the Drugs 2005 organized by *Proj*; ASA Prevent Group, Eronet, BH Telecom that support the Sarajevo Film Festival, etc.

Whatever motivation is behind funding and sponsorship from business in BiH, it should be explored. Many companies are seeking opportunities to sponsor events, as these can be moments to gain good publicity to building consumer awareness, often at what is a relatively a low investment of their publicity budgets.

In order to access support from business, as with most donors, cultivating links is important. When doing so, a professional and businesslike approach is important to demonstrate to the business world that your NGO is worthy of support and that you can be trusted to work well in a partnership.

See Annex for a List of the top 100 companies in BiH for 2004 as per *Poslovne novine* (Business News), No 1144-1145, Year XXXIV, Sarajevo, July - August 2005

14 - Official Gazette 32A/97 and Official Gazette 29/00, Article 11.

Foundations

KEY EXPERIENCE

During the implementation of the Project Campaigns, 6.58% or 27,428 KM was raised from foundations. See the Diagram 1. : *Sources of Funds Raised in 2004-2005 Campaigns.*

Grant-making foundations range from large international organizations, such as the Charles Mott Foundation, to small local groups. They can be a valuable source of financial support, as they are set up with the explicit intention of funding charitable work. At present in BiH, there are very few domestic foundations that provide funding¹⁵. Those foundations that do provide funding appear to mainly distribute funds from international sources or donors.

The grants process for international foundations is similar to international development organizations. Foundations most often tend to provide grants to organizations that work in their specific field of interest; for example, the Mott Foundation gives grants in four areas: civil society, environment, Flint Area, and poverty.

A certain amount of research will be required to identify foundations that may be potential sources of grants for your organization. You should be prepared for a relatively lengthy and involved application process, but securing funding from a foundation can often open a lasting and mutually beneficial relationship. Foundations need organizations to collaborate with for pursuit of their mission; your strengths--your activities and results--can support their mission.

Self-Financing

It is increasingly common for CSOs to generate income through selling products and/or services to the public or others, and this trend is emerging in BiH (see below). In order to differentiate themselves from commercial "for-profit" businesses, organizations that generate revenue in this way are often known or label themselves as "social enterprises." Social enterprises channel any profit they might earn from their activities into their ongoing mission.

At first, there may seem to be a contradiction for non-profit organizations to attempt to make profits. The stereotype of the "greedy businessman" deters some in the non-governmental sector from considering or starting their own social enterprise, and some non-governmental workers are ideologically opposed to obtaining funds in this way. Others maintain that as long as the money is raised in an ethical and sustainable fashion, and that organizations do not focus on making money at the expense of their original missions, self-financing or social enterprise activities can be a valuable addition to traditional fundraising methods.

15 - Foundation Women's Initiative BiH www.bhwifoundation.com.ba, Community Development Foundation Mozaik www.mozaik.ba, Open Society Fund BiH www.soros.org.ba

Often social enterprises attempt to market products or services that tie in with their mission, as this is where a competitive advantage exists. For example, organizations that deal with children may organize a childcare facility, or a human rights organization might provide counseling services. Other civil society organizations earn income through simpler activities that are unrelated to their mission such as renting office space or the provision of services (such as language classes, computer training, internet cafes, etc.).

A Few Examples Social Enterprises from Around the World

These are some of the organizations supported by NESsT (www.nesst.org) an organization which supports the development of social enterprises that increase the financial sustainability and social change impact of CSOs.

Organization:	P-Centrum, Czech Republic
Mission:	Providing treatment and support for drug users and their families.
Social Enterprise:	Woodwork business employing recovering addicts
Organization:	Open Garden Foundation, Hungary
Mission:	Promoting sustainable agriculture and healthy lifestyles through organic farming
Social Enterprise:	A door-to-door home delivery service for organic fruits and vegetables.
Organization:	Pentru Voi, Romania
Mission:	Providing assistance to people with intellectual disabilities
Social Enterprise:	A bakery which employs four of the organization's clients

Self-financing - A Beginner's Guide

First of all, you should consider what your organization has to offer in terms of potential profit-making activities.

Your organizational capital can be broken down into four categories - human, physical, environmental, and relational capital. Human capital refers to the skills which your staff possess that could be directly related to the work of your organizations, or perhaps indirectly (for example IT skills or accounting skills). Physical capital is the equipment, materials, land, building, offices which your organization may own or rent. Environmental capital is that which surrounds your organization - are there any natural sights or cultural events in your area which you could market? Finally, relational capital is the knowledge and contacts that your organization possesses - it may be that you can use this type of capital to act as an intermediary or as an information directory.

Once you have identified the strengths of your organization that you wish to try to utilize, it is time to develop a business plan. Many CSOs will not have much experience in the business field and may need outside help - for example from business consultants or business banks - in order to create a good plan. A business plan is also important for monitoring the progress of your enterprise and assessing whether you are making the income you had planned. See the Worksheet 9 for *A Sample Business Plan* format.

While not yet applicable in BiH, there is a new category of donors developing that specialize in "venture philanthropy" and may be more willing to assist with funding to start or fund a social enterprise

(www.acumenfund.org, www.venturephilanthropyguide.org, www.echoinggreen.org).

Organizations that are interested or involved in social enterprises activities should bear in mind that your product or service will be linked in the minds of your customers with your organization. If you have spent years building up your profile in your community, a poor quality product or service could undermine all your hard work. Your reputation and credibility are at risk, so it is in your interest to provide your customers with the best available quality. It is worth asking the following questions before committing yourself to start self-financing through a social enterprise activity:

- If we sell a product or service to help support our organization, will the effort be justified with the time expended relative to the profit gained?
- Are we sure that the selling program neither restricts nor replaces our usual fundraising?
- What marketing plans can we develop which will maximize our chances for real social enterprise profit?
- If we sell to our regular donors, will we run the risk of annoying them and perhaps losing their charitable support because of what they may see as yet another solicitation?
- Is the product or service of a type and quality we would want to associate with our organization (does it reinforce our brand)?





Example of Bosanske rukotvorine

www.bosnianhandicrafts.com

A well-known example of a social enterprise in BiH is Bosanske rukotvorine, now working for over 500 vulnerable women from all three major ethnic groups in the country. Most are heads of households, having lost their family members in the war. They are often from the rural parts of the country, with little or no education, and lacking employment opportunities.

Bosanske rukotvorine sells its products in countries such as France, the US, Slovenia and Switzerland. The organization grew out of a psycho-social project started in 1995 by Norwegian People's Aid to improve the prospects of women in refugee / collective centers. In 1999 the project was spun-off and was registered as a local humanitarian organization with a separate commercial trading arm called BH Crafts Limited. The organization has gone from strength to strength and was named one of the Social Entrepreneurs of the Year by the Schwab Foundation in 2001. All profit made by BH Crafts Limited are returned to the NGO, and these resources are used to further the humanitarian mission of *Bosanske rukotvorine*.



Chapter 5.

Fundraising Techniques or "WHAT YOU DO TO GET THE \$\$\$?"

Once the strategic preparations have been made, you can begin to plan the specific activities of fundraising campaign. There are a large variety of techniques and methods that you may use, although your choice is likely to be limited by the capacities of your organization and staff, your target groups, the character of your local community, and your financial target. The number of options available is such that there is a suitable combination of fundraising activities to meet the need of almost every organization.

During the Project Campaigns, NGO partners used nine different fundraising techniques, and results are as described in Diagram 3 below. However, it is not possible to assume from this information that a phone-a-thon is the best technique to use in Bosnia and Herzegovina, as the sample size is too small and each organization differs from the next.

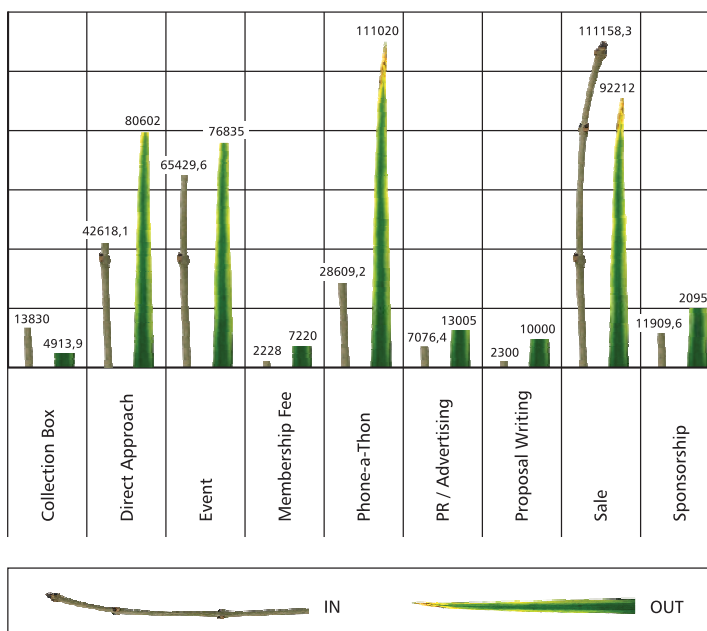


Diagram 3: Investment Versus Return of Project Campaigns

What works and what does not work is something that each organization has to determine by assessing their own capacities, appeal of the cause for which they are fundraising, as well as the capacity of their community where the campaign is implemented. It is advisable to keep track of results of each technique, and for a tool to use see Worksheet 10: *Fundraising Techniques Overview*.

Events



KEY EXPERIENCE

During the Project Campaigns a total of 76,835 KM was raised from special events from an investment of 65,429 KM at an average ROI of 1.17. See Diagram 3: *Investment Versus Return of Project Campaigns*.

Special events (like concerts, auctions, cinema and theatre nights, etc.) are probably the most widely used fundraising technique. Special events are often used as a focal point or highlight of many fundraising campaigns. They are an excellent way of gaining public interest, obtaining funds, attracting new members and volunteers, and educating the public. However, they can require the devotion of a great deal of time and resources, and you risk that an event may not be as successful as hoped. A clear decision on what you want to achieve, as well as proper planning taking your capabilities into account, reduces the attendant risks.

Here is a useful checklist to keep in mind when organizing events¹⁶:



1. Pick the right activity - it must be something people will find interesting and enjoyable, but not too complex or difficult to organize. If possible, pick an event that fits in with your work and goals of your organization, and make sure that it appeals to your target group (an example here would be good);
2. Do the costing and projections of revenue likely to be raised - if the event is not likely to bring the desired financial gain, don't do it;
3. Set a date and venue some time in advance to ensure you have enough time to plan the event properly. Check that your event does not clash with other local events or holidays;
4. Get the permissions you need for using public or private property;
5. Consider involving other organizations - this will increase the number of participants and the amount of resources that can be devoted to the event;
6. Make sure you have as much publicity as possible through local media sources and the use of celebrities. All your supporters and staff must be made aware of what is being planned as news spreads quickly by word-of-mouth;
7. Obtain business sponsorships if possible, as this will help to cover costs and reduce the financial risk;
8. Plan and prepare well for the day - your volunteers and staff should know their roles, and any equipment you may need should be in place;
9. Tidy up afterwards; your public image will suffer if you do not;
10. Thank all the participants for their participation and donations, and let them know how you are using their money;
11. Add the names of sponsors and those who attended the event to your mailing list.

¹⁶ - Adapted from Michael Norton, *The Worldwide Fundraiser's Handbook*, 2003. p.158.

Types of Charity Events -

"There are thousands of different possibilities but they all boil down to giving donors something for their money"¹⁷

- Sporting events
(football matches, basketball matches, swimming contest, etc.)
- Charity gala dinners
- Concerts
- Sponsored walks or fun runs
- Lotteries and raffles
- Games nights
- Film premiers and showings
- Art or fashions shows
- Discos for young people
- Auctions of donated goods and 'promises'
- Collection days
- Café 'social' evenings
- Picnics or days out
- Theatre night

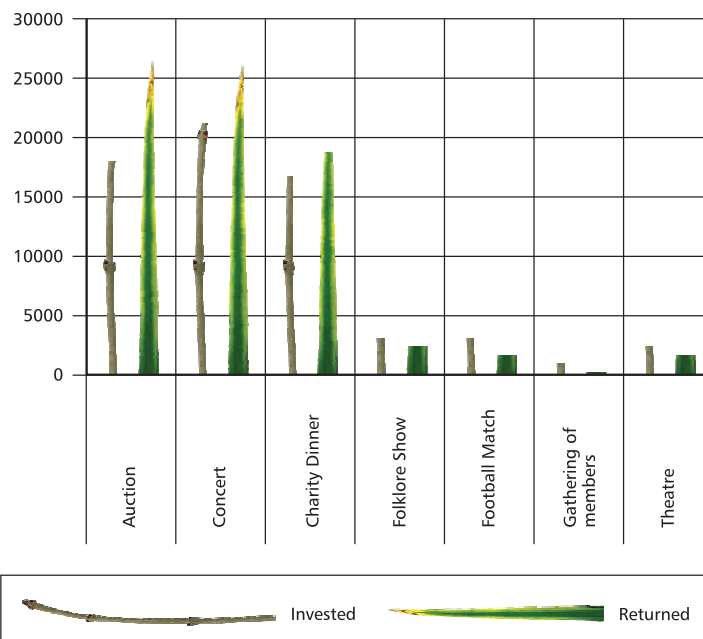


Diagram 4: Invested vs. Returned per Type of Event for Project Campaigns

17 - Wyman, Ken, *Guide to Special Event Fundraising*, 1990. p.19

The chart above shows the investment and return for the seven types of special events that were used during the Project Campaigns.

It is difficult to say that one type of event works better compared to another. But, some useful general comments can be drawn based on the experience:

- Organizing an event is demanding on human and material resources of an NGO - for many CSOs with limited capacities and resources, organizing an event can represent a real constraint and too great a challenge;
- Organization of an event demands superb and detailed planning - not a single detail can be left unattended, as these details can turn against you at the very moment when you least need it (i.e. during the event itself).
- Advance funds, and sometimes large amount, are needed to pay costs before revenue is collected, and many organizations do not have the required budget. Using operating funds can be too risky, as the event may turn out to be a loss. Securing business sponsorships can be a part of the solution.
- A well-organized event can bring a high level of publicity to your organization and your cause - this is a way to foster and maintain community interest in your cause and to educate the public.

Sponsorship

KEY EXPERIENCE

During the Project Campaigns, a total of 26.150 KM was raised from sponsorships with an investment of 6,491 KM at an average ROI of 4.0.

Organizing an event can be an excellent opportunity to attract businesses or governments to support you through sponsorship. However, CSOs may want to establish policies on the types of businesses they are prepared to work with for ethical reasons. If you decide to look for financial and/or in-kind support for your event through sponsorship, the following is recommended:

- **Clearly define the opportunity** for the sponsor by making the sponsor realize what is in it for them. For example, a letter might read: *"This event will be an opportunity for your business to reach a highly influential and international audience... You will promote your products and services in an open forum that brings you face to face with over 100 experts on XXX issue, representatives of relevant Ministries,");*

Although membership will not bring in funding instantly, planning a membership drive as part of your campaign may do a great deal to assist with your long term sustainability. Events are a good opportunity to persuade people of membership benefits, and your advertising should make clear how people can join.

KEY EXPERIENCE

Obrazovanje gradi BiH, a Project Campaign partner, chose membership as a techniques aiming to recruit 900 - 1000 new members. The membership fee varies from 10 KM to 200 KM, so their initial estimates for this technique were that they will be able to raise 20,000 KM for 20 new educational scholarships.

During their 4 month campaign, the organization recruited 639 new members and raised 7,220 KM, where the average membership was 11.3 KM. See Diagram 3: *Investment Versus Return of Project Campaigns*.

However, the benefits of membership drive went beyond the formal time frame of the campaign. Recruitment of new members continued, so that Association recruited a total of 1,055 new members and generated a total revenue of 12,000 KM.


Filantropija za budućnost / Philanthropy for the future

Dragi prijatelji,
Od 1994. godine Udruženje pruža moralnu i materijalnu pomoć djeci žrtava rata 1992-1995. godine, invalidnoj i talentovanoj djeci iz Bosne i Hercegovine.
U ovih deset godina Udruženje je stipendiralo više od 700 djece i podjelilo 15.250 stipendija u vrijednosti preko 1.500.000 KM. Na ljetovanju u Hrvatskoj, Sloveniji, Italiji, Švicarskoj, Francuskoj, Njemačkoj, Austriji i Bosni i Hercegovini bilo je više od 850 djece.
S obzirom na činjenicu da još veliki broj djece žrtava rata nema neophodnu materijalnu pomoć za uspješno školovanje, a da se smanjuje broj donatora, Udruženje je otpočelo projekat "Filantropija za budućnost" uz podršku USAID-UMCOR-a.- Bosna.
Cilj projekta je da se poveća broj članova Udruženja (sa sadašnjih 850) za novih 1.000 koji bi redovno plaćali godišnju članarinu, a ta sredstva usmjerili za stipendiranje djece i mladih.
Hvala vam što ćete kao novi član Udruženja postati dijelom porodice čovjekoljubca koji svoju ljubav i humanost posvećuje djeci i mladima koji su ostali bez jednog ili oba roditelja.

UPRAVNI ODBOR

Dear friends,
Since 1994 the Association gives moral and material support to the children who are victims of the 1992. - 1995. War in BiH, invalid and talented children from Bosnia & Herzegovina.
In this ten years the Association has provided scholarship for more than 700 kids and has granted 15.250 scholarships in amount bigger than 1.500.000 KM. More than 800 kids have been on their summer holidays in Croatia, Slovenia, Italy, Austria, Switzerland, France, Germany and Bosnia & Herzegovina. Considering the fact that there is a still big number of children - victims of the war, who don't have necessary material support for successful education, and that there is decreasing number of the donors, the Association has started the project "Philanthropy for the future", supported by USAID-UMCOR Bosnia. The project goal is to increase the number of the Association's members (from present 850) to new 1.000 who would regularly pay annual membership and those finances will be directed to the kids & youth scholarships. We would like to thank you for becoming new member of the Association and part of philanthropic family who is dedicating its love and humanity to the children and youth without one or both parents.

MANAGERIAL BOARD




Udruženje "OBRAZOVANJE GRADI BiH"
Dobojska 4, Sarajevo
Bosna i Hercegovina
tel/fax +387 33 710580, 710581
e-mail: ogbh@open.net.ba
www.ogbh.com.ba

za/fo

Udruženje "OBRAZOVANJE GRADI BiH"
Dobojska 4
71000 Sarajevo
Bosna i Hercegovina

BANKOVNI RAČUN
Central Profit Banka dd Sarajevo
1291011000375554



PRISTUPNICA/APPLICATION

GENERALNE INFORMACIJE/GENERAL INFORMATION

ime i prezime/name and surname _____

zanimanje/profession _____

adresa/address _____

telefon/telephone number _____

potpis/signature _____

Pojedinačno ućlanjenje/Single membership

1. Źelim da platim godišnju ćlanarinu
I want to pay annual membership fee

- ☐ 10, 00 KM
- ☐ 15, 00 KM
- ☐ 20, 00 KM
- ☐ 30, 00 KM
- ☐ 40, 00 KM
- ☐ 50, 00 KM
- ☐ više/more

2. Ćlanarinu ću uplatiti:
The membership fee will be paid:

- ☐ U cijelom iznosu
In one instalment
- ☐ U dvije rate
In two instalments

3. Ćlanarinu ću uplatiti:
The membership fee will be paid in cash

- ☐ Novcem
- ☐ Na raćun Udruženja
The membership fee will be paid on the Association account

4. Doniram jednokratnu pomoć od:
I donate a single help of:

- ☐ 100, 00 KM
- ☐ 150, 00 KM
- ☐ 200, 00 KM
- ☐ više/more

Kolektivno ućlanjenje/Collective membership

ime kompanije/company name _____

Telefon/telephone _____

Adresa/adresa _____

Kompanija će stipendirati
Company grant scholarship for:

- ☐ 1 studenta/student
- ☐ 2 studenta/students
- ☐ 3 studenta/students
- ☐ više studenata/more students

Kompanija će donirati jednokratnu pomoć:
Company grant donation:

- ☐ 200, 00 KM
- ☐ 400, 00 KM
- ☐ 600, 00 KM
- ☐ više/more

Ćlan Udruženja dobija ćlansku kartu u koju se uvodi visina uplaćene ćlanarine.
Member of Association becomes membership card with amount that was given.

The Direct Approach

KEY EXPERIENCE

During the Project Campaigns, CSO partners used "direct approach" techniques and raised 80,602 KM, or 19.34% of the total amount of funds raised at an average ROI of 1.89. See Diagram 3: *Investment Versus Return of Project Campaigns*.

The best ROI achieved using a direct approach technique was 3.29 by the Association of Parents of Children and Youth with Special Needs *Sunce nam je zajednićko* from Trebinje. The highest amount raised using a direct approach technique was 15,915 KM by *Obrazovanje gradi BiH* in Sarajevo. The most extensive contact list was developed by *Sluh* Mostar, with over 12,000 entries that were contacted during their campaigns, raising 13,000 KM.

All three CSOs made a direct mail effort to businesses, institutions, and individuals, and followed up with telephone calls and or personal contacts through visits to companies and institutions.

Different direct approaches include:

a. Personal Contacts

One of the most effective fundraising techniques is meeting and speaking with potential donors in person - individual, business, or governmental. It gives you the chance to explain the aims of your organization and how you can help the community, as well as building the connections that your organization needs to be sustainable. However, you will need to prepare thoroughly for such meetings, as the business people and community leaders that you need to influence usually have limited time and will expect a professional approach.

First, research about the members of your community who you think may be able to contribute to your campaign. Popular figures in your community are always a good start, but there may be others who can help who are not so well known.

After making contact with a potential donor by letter or telephone, you will need to decide what approach you want to take and to plan your presentation. If it is the first time you have met the donor, it may be that you simply want to introduce your organization to start to develop a relationship and to gauge the donor's initial attitude. First impressions are vital, so it is important to be well-dressed, punctual and friendly.

In follow-up visits, you can do more to sell your organization and to make your request for support. You will need to tailor your appeal to the donor's interests and to what they can provide in terms of financial help. Visual aids such as leaflets and reports on your organization are very useful in this respect. You should be able to tell them how their support has helped in the past in terms of specific results, and always outline how your projects benefit your community before asking for donations. Be sure to record the details of your contacts in your database, and follow-up any support with a thank you note.

b. Contact through mail, email or telephone

Using the telephone to elicit support means that you can spread your message to many potential donors in a short period of time and with little investment in materials, events, etc. Apart from contacting your existing membership or supporters to inform them of your planned campaign, you may need to obtain a suitable database of people who may be interested in assisting your organization. If you do decide to solicit donations via telephone, a pre-prepared script explaining your cause or a list of prepared responses to commonly answered questions is required. You may also like to set up a telephone line to receive donations, and the number could be displayed prominently in your advertising. For more details see the Phone-a-Thon below.

Direct mailing and, increasingly, email or mobile phone SMS appeals are also used as a fundraising tool. Again, you will need a contact list. A starting point for development of your contact list can be a business or community directories, found in post offices or chambers of commerce. Other CSOs or commercial list holders are good sources, but may come at a price or are not currently available in BiH.

It should be kept in mind that first time direct mail campaigns, or so called "cold mailing," can be expensive with a minimal response (the UK response norm for first time direct mailing is between 0.5 and 1.5%¹⁸). Direct mailing is better at building up a long-term support base than generating short-term income. It may take two or three years, several rounds of mailings, and a great deal of commitment in terms of time and resources until you get a return on your money.

If you are interested in trying a direct mailing, the development of a so-called "warm" mailing list is practical. This list is tailored to people from the social or age group that you wish to target, or organizations and businesses that have a stake in your cause. However, note the development of such a contact list requires many hours of research.

The message of your email or letter is best if it appeals in a personal way to each individual and needs to grab the attention of the reader. Try to use the case studies of real people who have been helped by your project and specify what can be achieved by various donations. For example:



"10 KM will help buy school books for 9 year old Hana living in a rural slum whose household lives on less than 5 KM per day"

If you have the resources, photographs of your work are excellent for supporting your message.

Here is a short "Good Direct Mailing Guide"¹⁹:

1. **Personalize your appeal.** Include stories about individuals and use emotion in your writing.
2. **Include a deadline** as a gentle "prod" to get those contributions in.
3. **Mention details about your organization.** Include in your letter information about where the money goes.
4. **Follow up with a note or a phone call** to those who have not responded.
5. **Always send a thank-you note when you receive a contribution in response to one of your letters.** Hand-written thank you cards are always nice. Better yet, after the campaign, include details about persons that benefited with the funds raised, even a photo.
6. **Suggest a giving level.** Many people will wonder how much they should give. One strategy is to suggest a level, or provide different levels and what each provides in tangible terms for your beneficiaries. Another strategy is to let them know that any amount is welcome, or you can say, "In the past our contribution average has been X.XX KM".

18 - www.fundraising.co.uk/forum

19 - Adapted from American Diabetes Association fundraising manual
www.uscaa.org/natl/2002/fundraisingManual.html

Advertising

Using advertising such as billboards and leaflets and in the press (newspapers, magazines) is an excellent method to raise awareness of your cause, although it can be difficult to quantify the exact benefit of such advertising. Advertising can be used for an extremely wide range of purposes, such as soliciting donations, encouraging new membership or volunteer support, or simply informing the public about your work. Whatever you advertise, it should be regarded as an awareness raising activity to reach a wider audience for a core fundraising strategy.

Advertising in the press is expensive, but it has the advantage that you can target audiences through what you know of the readers of a specific newspaper or magazine. Press adverts are usually short due to cost; therefore, getting your key message across in a limited space is vital. A useful device for checking the response to a specific advert is to have a unique reply coupon or phone number specified so that you can assess how successful one advert is in term of raising money or attracting new members.

Leafleting has some advantages over press advertising, as you have much more space to present your message; and, it can be less expensive. Costs savings for leafleting may be achieved through "in-house" graphic design, saving on printing costs by limiting the numbers of colors and the quality of paper to be used, and so on. While street distribution is perhaps the most effective as your staff will have the opportunity to explain your organization and campaign to the public, leaflets may also be delivered directly to homes and displayed in busy areas in your community, such as shopping centers, cafes, during sports events or festivals, and so on.

Posters are another useful advertising method that may range from large professionally-produced images on rented billboards to small cheaply printed posters that can be put up anywhere. Large posters will normally be expensive to produce and display, and their effectiveness depends on the power of the design and messaging. These types of posters are best used for awareness-raising for a particular issue or a major charity event. They do not normally allow people to respond directly unless you include a telephone number. Smaller posters can be displayed all over your town or city in/on many different places: shop windows; on specific poster panel; walls; telephone poles; cars, and so on. Such saturation makes it easy to have a high-visibility campaign. Tear-off tags may be used with a telephone number or donation coupon to encourage and provide the public an opportunity to respond.

Below you can find the examples of posters used during the Project Campaigns with details of dimensions and a costing per piece:

Organization	Topic	Dimensions	# of copies printed	# of copies distributed	price per copy in KM
Bona Fides	Phone-a-Thon	100 x 141.4 cm	200	200	1
Humanitas	Phone-a-Thon	42.0 x 59.4 cm	1300	1300	1.15
Obrazovanje gradi BiH	Campaign as a whole	510 x 240 cm	4	4	578



KEY EXPERIENCE

Communicating the message clearly and targeting the right audience is essential in advertising, otherwise you might produce an undesired result. For example, one of the organizations from the Project Campaigns (*Obrazovanje gradi BiH*) advertised to solicit new donors. However, due to an unclear message, rather than attracting new donors, they attracted new requests for assistance (scholarships).

Collections

There are different forms of collections, such as, but not limited to:

- **House-to-house collections:** either knocking on doors and asking for support or leaving a letter with request for support for the fundraising cause and calling back next day to attempt to solicit a donation. This requires having enough people well prepared and organized staff or volunteers.
- **People collecting in public:** normally people collecting dressed or identified to advertise the cause of your organization with a collecting vessel asking for support in busy public venues such as streets, shopping centers, public events, etc.
- **Fixed collection boxes:** permanently or semi permanently fixed collection boxes in locations with a high level of public pedestrian traffic that clearly and attractively express your fundraising cause.

Things to take care of when running a collection:

- **Choosing a venue and time** - there are many places to target for public or street collection - local supermarket, shopping center, local sports ground at a match, the main street in town. The more people around, the more money you are likely to collect. Think about the best times of year to collect - pre-holiday periods, days before the international day devoted to the cause you are raising funds for and select the times of the day when there will be the most people around.
- **Getting permission** - this depends where you want to hold the collection. If you want to hold the collection in a public area in Bosnia and Herzegovina you will need a written license from the local authorities (the Municipality and local police). If you want to hold the collection in a privately owned space (shopping center, supermarket, etc.) you need the permission of the management/owner.
- **Proper accounting system** - organize how the cash will be received and accounted for, and bank all the proceeds immediately.
- **Organizing collectors** - recruit, recruit, recruit!!! The more people you have collecting, the more money you are likely to collect. Brief your collectors well about the cause of the fundraising and your organization, make them visible so that they are eye-catching (T-shirts, caps, sashes, etc.) making it clear who and what they are collecting for. Enthusiastic volunteers willing to stand in the street/public space and ask passersby to contribute are crucial for your collecting success.
- **Equipment and material** - identify the most suitable collecting vessels (buckets, tins, boxes, etc.). Prepare written material/leaflets about your organization that the collectors can hand out. Consider having token gifts ready to give in return for the donation such as branded pens, note-pads, T-shirts, etc.

- **When the collection is completed** - collect the collection vessels from the collectors, open them and count in presence of a responsible or independent person/body for the sake of accountability. Bank all proceeds immediately upon receipt, thank all your donors, thank your volunteers and do a follow up session to find out what went well and what was not so effective, in order to plan better next time keeping a record of locations that did best.

KEY EXPERIENCE

Sluh Mostar and Partner Banja Luka organized fixed collection boxes during their respective Project Campaigns. During the period of the campaigns, this technique was not profitable, as their combined investment of 13,830 KM returned 4,913.90 KM (See Diagram 3: *Investment Versus Return of Project Campaigns*). The initial cost required for the production of the collection boxes was high, and the specific Project Campaign period relatively short (2 months).

Interestingly, for *Sluh* Mostar, over a longer period of time the return has improved. After nine months 12,680 KM has been raised giving the organization an average monthly income of 1,408 KM from the 358 collection boxes they have been placed in 207 betting shops, 24 petrol stations and 127 shopping centers and specific shops in 12 towns in the Herzegovina area. The boxes are collected on a monthly basis and opened in presence of the members of the Executive Board of the Association.

Sales/Trading of Promotional Items

A very visible fundraising activity is the sale of promotional items to supporters. These sales are not a social enterprise - which is a permanent business activity of your organization earning constant revenue - but a periodical sales effort for particular fundraising campaigns. Promotional items can include things produced during regular programs, or a specific project activity by beneficiaries, publications such as books, calendars, CDs, and so on. Many CSOs often find sales as an attractive fundraising option, but it is advisable to keep in mind the following:

- Sales require substantial work (management time, human resources such as volunteers) and usually achieve relatively low margins;
- Sales often require a high up front investment;
- If you are selling through a gift shop a good location is required;
- The quality of merchandise is important.

TCSOs often consider the following types of items for promotional sales that can include the organization's name, logo and message:

- Greeting card
- Calendars
- Diaries
- Address books
- Pens and pencils
- Tee-shirts
- Key-chains
- Mugs
- Caps or hats

KEY EXPERIENCE

Sales were used in almost every Project Campaign where the total invested was 111,158 KM and the total raised was 92,222 KM. See Diagram 3: *Investment Versus Return of Project Campaigns*.

What was obvious from this experience is that within a short period of time (most campaigns were less than 3 months), it is difficult to make a good return due to the high level of initial human and financial resources required for such efforts.

Many of the participating CSOs felt fundraising would be easier if they had a **sales product** to offer; however, even for a well-established and good quality product, all the issues described above are critical to success or failure of this technique. And, although quality of the particular product is important, it is the cause of the CSO that should be used to sell the product.

For over eight years *Obrazovanje gradi BiH* has been producing and selling an annual calendar to individuals, companies and public institutions, and proceeds have been used for scholarships for children and youth victims of the war, the disabled and talented children. From the sales revenue *Obrazovanje gradi BH* has been able to fund an average of 31 scholarships per year, and during the last four years (2001 to 2005) the sales revenue has averaged 13.5% of annual revenue. The marketing and sales of the calendars is a collective responsibility of all levels of the Association, from the management, staff and volunteers, to the beneficiaries (i.e., those that win scholarships).

Phone-A-Thon

From the experiences of CSOs during the Project Campaigns, this technique appears to be able to be cost-effective and an efficient way to build the ranks of first time supporters.

To organize a Phone-A-Thon in Bosnia and Herzegovina, CSOs must make an application to the relevant telephone company or companies, depending on the territorial area in which the organization wishes to run the appeal that includes:

- Proving the CSO is a legal entity whose primary purpose is not profit-making, and that the statute clearly defines humanitarian work as an activity;
- Submitting a project proposal that provides details of the proposed humanitarian activity to be funded from the revenue and details of target beneficiaries of the activities

The Executive Board of the particular phone company reviews the applications. As there are multiple telephone companies in BiH, different specific terms and conditions are applicable to each. Telecom Srpske allows for a one-month Phone-A-Thon once per year, with the possibility of a one-month extension (therefore, a maximum of two months), whereas BH Telecom and HT Mostar allow for a maximum of three months. Detailed specific terms and conditions should be obtained through the marketing departments of each of the respective companies²⁰.

KEY EXPERIENCE

During year 2 of the Project Campaigns four of five CSOs ran phone-a-thons and a total of 111,020 KM was raised from an investment of 28,609.20 KM at an average ROI of 3.88 (See Diagram 3: *Investment Versus Return of Project Campaigns*).

Of these four phone-a-thons, the three in the Republika Srpska succeeded whereas the one in the Federation BiH failed. Although it is difficult to make definitive conclusions due to the differences in causes and CSOs it is clear that the advantage of a phone-a-thon in the Republika Srpska is due to:

- The lack of a privacy law that allows RS Telecom to send a free-of-charge SMS prompt to more than 500,000 clients;
- A four digit number to call for donations that is far easier to remember than the nine digit numbers in the Federation BiH.

20 - Marketing and Sales Department of HT Mostar - Tel: 036 395 416; Marketing and Sales of Telekom Srpske - Tel: 051 240 250, Marketing and Sales of BH Telecom - Tel: 033 620 027



Chapter 6.

Publicity and Campaign Communication

Public relations may be defined as the planned, proactive, and positive approach taken by an organization to advance its mission through contact with others. While the importance of good public relations (PR) seems to be relatively new for the non-governmental sector in BiH, there is a growing awareness amongst CSOs that this is as important for their work as it is for business sector.

Good organizational PR practice is no more important in your every day work than during a specific fundraising campaign. It is important that NGOs consider and prioritize all types of PR in their communications strategies. Recognizing the importance of PR and increasing the awareness of it amongst all staff (paid and unpaid) is the first step. Below are some examples of good PR which can be incorporated in the work of a CSO at minimal or no cost:

A. Front Door PR: good "front door" PR includes:

- A cheerful and helpful person answering the phone;
- The office has an attractive and welcoming reception area;
- The agency website is user friendly;
- Email and voicemail messages are promptly returned.

B. Maintenance PR: good "maintenance" PR, regardless of the group you are addressing, includes:

- Responding promptly;
- Providing clear expectations and direction;
- Evaluating and giving feedback;
- Touching base and following up;
- Sharing information and linking resources;
- Asking for input (and acting on it);
- Finding ways to recognize and celebrate;
- Showing respect for time;
- Saying thank you.

C. Outreach PR is going beyond your current constituency or audience to reach new people and develop new relationships; i.e., getting the word out about your organization. Good "outreach" PR can include:

- Distributing press releases.
- Distributing brochures, posters, and other information about your services.
- Developing an agency video, website and other special media.
- Publishing a newsletter.
- Taking part in conferences, information fairs, etc.
- Advertising.

- D. Collaborative PR:** Collaborative PR involves partnerships and alliances with other groups and organizations to further mutual goals. Collaborating with other organizations to raise awareness about services and beneficiaries comes naturally if you are already working together.

A Campaign Communications Plan

A well-conceived communications plan will be essential to the success of your particular campaign, especially in the case of a broad-based effort that is directed to the general public. The following steps are a start to developing an effective communications plan:

1. Establish a case for support;
2. Identify target groups;
3. Identify the best channels to reach the target group or groups;
4. Develop the message according to the type of channel selected.

The case for support presents the rationale for people consider when deciding to support a fund-raising campaign or project. Properly executed, it is one of, if not the most, powerful and compelling tool your organization has at its disposal when communicating fund-raising objectives and persuading prospective donors to make a commitment.

Target groups may be the public, donors (individuals, businesses governments), partner organizations, competitors, authorities, local communities, the media, volunteers and beneficiaries. Ideally for each of these target groups you will analyse: What is our stake in the relationship? What is their stake in the relationship? How should this change in the future? Your message to each target group should be tailored according to these considerations.

You should also try to identify the best channels or techniques to use to communicate to your target group(s) such as:


- Written or electronic media;
- Specialized or mass media, local or national media;
- Your own publications or products (annual reports, promotional gifts like T-shirts, pens, notepads, posters and billboards, street promotions); and
- Specific PR materials like brochures or annual reports.

While images and language may vary for different target groups, these pieces must all communicate the same organizational identity or "brand" and should work to reinforce each other. Your identity or brand goes beyond your logo or symbol, and it is expressed in the name of your organization, your slogan, the style of printed or graphic imagery, the way you behave and interact with stakeholders. Think about how you use your logo, specific colours, preferred typefaces/fonts, editorial style, and so on. Printed materials that are distributed to your audience are powerful tools for expressing your brand. They should be carefully designed in order to optimise impact during, but also after the campaign, as they are relatively low costs. Once you have invested in time and resources to produce them, you are well served by maximising their impact by extending their shelf life. The mass media, either newspapers, radio or TV, are the most effective,

efficient and powerful forms to use to publicize your campaign and communicate your cause. If properly handled, the publicity that mass media exposure creates will increase public awareness for the campaign *and your cause*, rather than of just the campaign itself.

Before you start a communications campaign, it is important to establish/update your media contact list. For a sample media contact list see Worksheet 11: *Media List*.

Here are some different techniques for communication through the mass media:

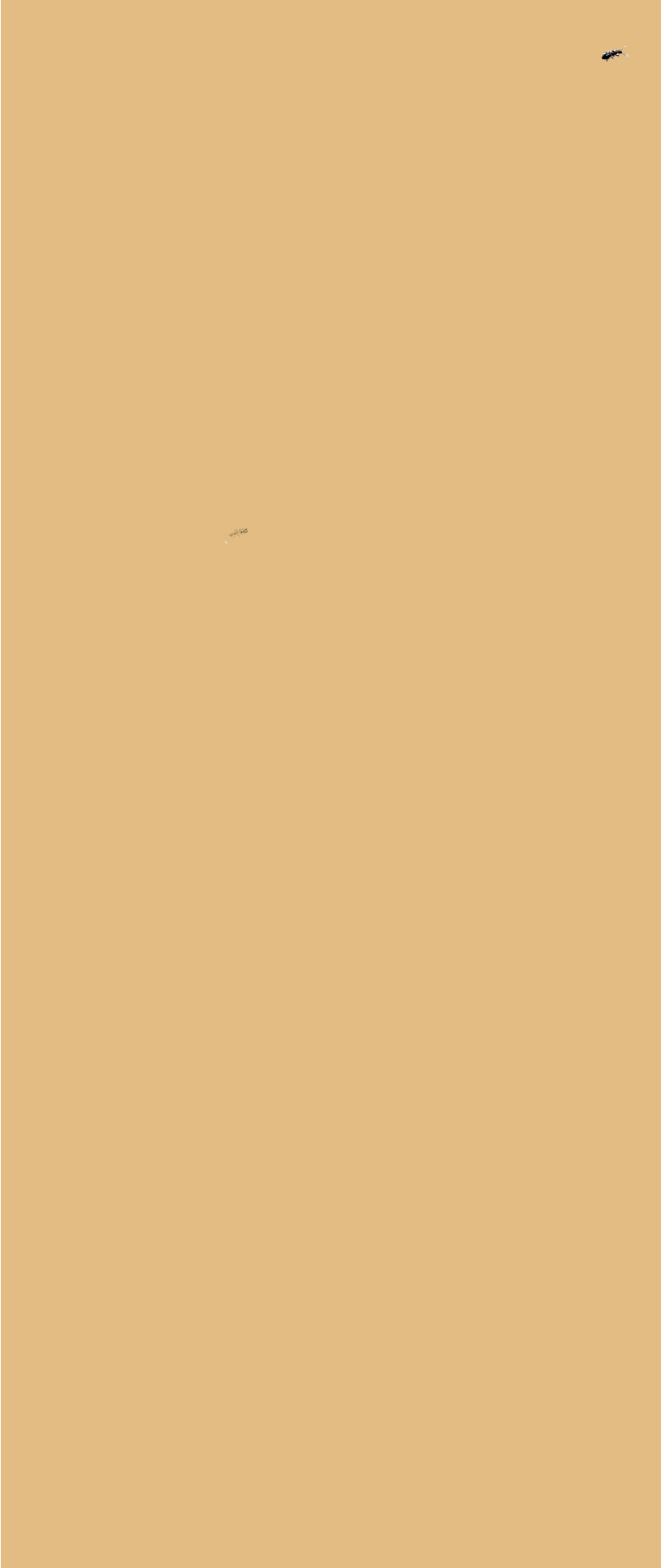
- **Press releases** - a short statement written by the organization for communication purposes about a particular event, result or issue. It is best to:
 - Spark interest with a dramatic or provoking title or headline;
 - Keep the release short not exceeding one page;
 - Make sure to address: WHO, WHAT, WHY, WHERE, WHAT IS NEW AND WHAT IS THE ADVANTAGE; and
 - Don't forget to mention the name, address, contact details of your organization and the name of your contact person. 
- **Press conferences** - an opportunity to make a public statement or presentation about a particular issue. Some useful tips to keep in mind when organizing a press conference:
 - Specify the topic;
 - Choose the appropriate venue and time;
 - Send a striking invitation letter to the media a week before the press conference and follow up 1 or 2 days before the conference;
 - Host the press (record media attendance, have promotional material available, provide information about who is available after the conference for statements, etc.);
 - Prepare a media package with written info related to the particular issue/subject of the conference, written material about your organization in general, and anything else that can help the journalists accurately receive, then broadcast the message you want to convey;
 - Choose a facilitator of the event;
 - If possible, invite a prominent person who will support you professionally or morally;
 - Do not make it last longer than 30 - 40 minutes; and
 - Remember, organize a press conference only if your information is newsworthy-timely--and you want to inform multiple types of mass media at the same time
- **TV and radio interviews:** These opportunities can work to your advantage or your disadvantage, if they do not go well. It is most important be prepared, so pay attention to the following:
 - Determine the 3 key points that you especially want the audience to hear or learn, and return to them during the interview;
 - Be clear about how much time you will have;
 - If possible, go through the flow or structure of the interview with the reporter before starting;

- Prepare the reporter by briefing him/her about your organization's mission, activities, the campaign and its purpose; and
- To be convincing, talk simply and towards your target audience.

It is important to plan and schedule the communication events or "publicity getters" in your fundraising calendar and at intervals that will complement your campaign's financial goals. Typical publicity getters to schedule for media events as milestones during your campaign are:

1. Introduction of the campaign and its goal;
2. A campaign "kick-off" event - carefully planned civic and community leader participation;
3. Reaching 50% of your fundraising campaign financial goal;
4. Reaching 90% of your fundraising campaign financial goal;
5. Total financial goal achieved;
6. Communicating to your constituency the activities and results of the campaign.

Further information and useful samples of press releases, press conference invitations, media clippings, media calendars, media reports, etc., of use for NGOs can be found at www.aed.hr/en/publications.asp in the booklet on *How to Communicate with Local Media - A Guide for Non-Governmental Organizations and Citizens' Initiatives* by Aleksandra Kuratko, GONG in cooperation with AED Croatia.



10/10/20



Chapter 7.

Assessment / Follow up

Your particular fundraising campaign is finished.



The "thank you's" have been said



The money raised has been counted.



Records have been gathered, copied, and stored.

But it is not over! The days immediately following a campaign are the best time to analyze what went right and what may have gone wrong.

Assess the Campaign

Assessment and the organized record of the knowledge gained is the final step in a well-organized campaign and will serve as a valuable resource to draw upon in the future.

Staff participating in a campaign should be asked to evaluate their area of responsibility and the volunteers with whom they worked. You want to determine what the campaign did well and not so well, which expectations were realistic and which were not, which techniques worked and which did not, and who performed well and who did not.

Systematically, go through the following key elements of your campaign:

- **PLANNING:** Was the campaign well planned? Did you have to make any major adjustments during the campaign implementation? How did this affect the campaign results?
- **RETURN ON INVESTMENT:** What was the overall return on investment (ROI) of your campaign and was the campaign financial goal realistic?
- **FUNDRAISING TECHNIQUES:** Did you use the right fundraising techniques - what was the planned versus achieved financial gain for each technique?
- **DONOR/SUPPORTERS:** Did your organization maintain its existing supporter/donor base, and did you expand and develop new supporters/donors? What type of new supporters/donors did you attract (individuals, businesses, donors, governments, etc.) and how many? How did you approach them? What were the successes and/or the failures?

- **PUBLIC RELATIONS TECHNIQUES:** Try to analyze the key PR techniques used and explain their importance in relationship to the amount spent on them and the results achieved or perceived. Which PR techniques worked best for your organization?
- **MEDIA:** Try to analyze your media relations. Did your communication plan work well? Are you satisfied with how the media followed and reported on your campaign? How many stories were featured in different platforms about your organization and the campaign during the campaign period? What was your best media success? What were the weaknesses of your media communications plan?
- **VOLUNTEERS:** How did you recruit the volunteers? Are you satisfied with their response and commitment? How many new volunteers that are interested in supporting your work in the future did you recruit through the campaign?
- **USING CELEBRITIES:** Who were the celebrities that supported your work and contributed to the success of the campaign? How did you recruit them? Can you count on their support again in the future?
- **PROBLEMS ENCOUNTERED:** What problems did you encounter during the campaign? How did you overcome them?
- **CONCLUSIONS/LESSONS LEARNED:** Synthesize your conclusions about your organization's efforts in a concise report with lessons learned that can be shared amongst all your staff, volunteers and supporters, so that the whole team is involved in the process and ready to do better the next time around.

Gathering answers to these types of questions can be found in analyzing information from the following sources:

- Your own record and recollection of campaign events and activities;
- Other campaign staff and volunteers recollections;
- Notes of progress meetings and progress reports;
- Tools for measurement of results of your fundraising such as Worksheet 8: Sources of Funds and Worksheet 10: *Fundraising Techniques Overview*;
- Financial reports;
- The quantifiable results who gave how much; and
- Supporters', donors' and other stakeholders' experiences.

Use the Funds Raised as Planned and Publicize!

Most importantly, organizations should use the funds raised during the campaign for the activities that you planned and as stated in campaign publicity. These activities actually function partly as a promotion to your existing and your new supporters and will be used in your next campaign.

Your fundraising follow-up is the foundation for your future success, so take the opportunity to capitalize on your results and pave the way for even better results next time.

100

100



Chapter 8.

Program Campaigns and Observations

Twelve Project Campaigns were implemented by nine organizations in three cycles of campaigns during the project period. These are described in the fact sheets included at the end of the chapter that provide an overview of each campaign, its purpose, the fundraising techniques used, resources, results achieved versus planned, ROI for each technique and the highlights of each campaign.

From the Project Campaigns (and during three "educational" forums held during the life of the project that provided opportunities for the exchange of experiences and the sharing of lessons by participating organizations, UMCOR and external consultants), a number of observations were drawn. These are grouped in three categories:

1. The BiH context
2. Organizational context
3. Fundraising Techniques & PR Issues

The BiH Context

Regarding the BiH context the following key observations were drawn:

- Two thirds of the participating organizations achieved a ROI of greater than 1.0; that suggests fundraising from domestic sources is feasible and has potential;
- Fundraising efforts in BiH need to take into consideration a highly diversified local context (widely fluctuating levels of prosperity, complexity and division amongst government, geography, etc);
- Participating organizations did not encounter any legal obstacles to any of the fundraising techniques used;
- Tax benefits for donations by individuals and corporations to create incentives for private philanthropy are either non-existent (individual donations) or minimal (business donations). Despite this constraint domestic supporters are still donating;
- The ongoing availability of relatively easily accessed funding from international sources still encourages CSOs to ignore the development of domestic fundraising capacities to their future detriment;
- The more rooted an organization is in its community, the better chances for success in domestic fundraising it has;



- Often fundraising in BiH is perceived as "begging," therefore CSOs have to educate their community, supporters and volunteers to make them change their attitudes towards fundraising;
- Many CSOs are directly competitive, and the underdevelopment of effective and comprehensive coordination efforts within the civil society sector hinders fundraising efforts;
- There is a lack of transparency and a lack of a coordinating mechanism established by governments for CSOs to use to approach and access public funding.

Organizational Context

For organizational context the following observations were made:

- Nothing is more important than good, detailed planning for fundraising and the more time spent on this, the better the result;
- Market research is next in importance to planning to design realistic and achievable fundraising campaigns;
- The results of fundraising campaigns will grow with improved and expanded internal and external communication;
- The results of fundraising campaigns will grow with improved and optimum use of already available different resources (human, equipment, communication with donors, literature);
- All CSOs will benefit from regular staff training and educational activities for fundraising and public relations;
- Defining volunteer policies and investing in more pro-active volunteer recruiting will increase the quantity and quality of willing volunteers, particularly when CSOs in BiH must continually develop low cost resource options;
- It is advantageous to use direct beneficiaries in fundraising, as this adds credibility to campaigns and also portrays beneficiaries as active doers, rather than passive victims;
- Time will be won, resources maximized, and better results achieved during future fundraising campaigns if CSOs assess previous fundraising efforts, institutionalize lessons learned and apply these next time.

Fundraising Techniques & PR Issues

For fundraising and public relations techniques, the following observations have been made:

- There are no bad fundraising techniques for BiH, only poor assessments of context, unrealistic goals, over estimates of organization capacities, and poor planning;

- It is recommended to use specialists/professionals for specific fundraising techniques or events, particularly for complex activities such as organizing large concerts;
- As fundraising campaigns are often limited in duration, it is preferable to concentrate on a fewer number of techniques and get these right;
- In an environment such as BiH where there are few wealthy CSOs, a high value should be placed on "in-kind contributions," as these reduce up-front outlays for fundraising activities;
- Fundraising results will benefit when organizations invest in creating clear and consistent messaging. A coherent identity for all regular activities and all specific fundraising efforts is NOT optional.
- An organizational profile that fits the mission will ensure that targeted supporters are not dissuaded from giving (don't drive a Rolls Royce!).
- Up front capital is required for fundraising campaigns. As the majority of organizations in BiH have a minimum of excess funds other than those needed for daily operations it is often difficult to afford fundraising campaigns. It would be ideal if donors and governments established a transparent and structured fund to provide start-up money for CSOs' fundraising efforts. Money from such a fund could conceivably be provided to CSOs on a refundable basis.



Project Campaign Fact Sheets

Description of Fundraising Campaigns

First Cycle of Campaigns June 1 - September 30, 2004

Name of CSO: *Bosanske rukotvorine Tuzla*
Izeta Sarajlića 5, Tuzla, BiH
Tel/Fax: 00387 35 314 460/461
E-mail: office@bosnianhandicrafts.com
www.bosnianhandicrafts.com

Mission:

Through craft production and promotion, product design and educational activities Bosnian Handicrafts aims to provide both emotional support and a source of fair income for women of Bosnia and Herzegovina helping them to reconnect with their rich needlecraft heritage and set aside their differences.

Basic Organizational Facts

Type: Association

Management structure:

Nine-member management board with one managing director

Membership: N/A

Staff Structure: Seven full time employees

Offices and geographical coverage of activities:


A 150 m2 office in Tuzla, an office in Sarajevo and activities throughout BiH

Age of organization: Established in 1995

Other: A business arm of the Association for the trade of handicrafts was registered in 1999

Description of FR Campaign

'Shopping with Purpose' was the slogan of the campaign implemented by **Bosnian Handicrafts**. The purpose of the campaign was to increase awareness among the general public of BiH about the work, services, and support the organisation offers to socially vulnerable and marginalised women. Additionally, the campaign also aimed to increase the domestic sales of the homemade needlecraft products made by the socially vulnerable and marginalised women who are beneficiaries the association to ensure continuing sales and business that provides regular income to these women and funds for training of new beneficiaries.



Campaign funding:

The organization used 33,142 KM from a UMCOR/USAID grant to implement the fundraising campaign.

Summary of Fundraising Campaigns:

The following table lists the different fundraising techniques planned and used during the implementation of the campaign and the corresponding financial inputs and outputs

	Campaign Component/ Technique	Anticipated Outcomes	INPUT Monetary	OUTPUT Monetary
1	Sponsors	50.700,00	3.038,10	12.200,00
2	Charity Event		15.389,00	4.715,00
3	Corporate Gifts		4.258,65	8.166,00
4	Wholesale Program		2.300,00	2.478,00
5	PR		5.856,25	9.973,00
6	Proposal Writing		2.300,00	10.000,00
TOTAL			33.142,00	47.532,00

Results: The campaign raised a total of 47,532 KM at a Return-On-Investment (ROI) of 1.43

Campaign Highlights

- The campaign was launched with a very successful fashion show and auction. The event took place at the Bosniak Institute in Sarajevo on 7 July 2004 and marked the official start of the campaign. The selection of the venue and the voluntary participation of influential figures from BiH cultural and political life (e.g. Mr. Fehim Skaljic, Mayor of Old Town Sarajevo, Ms Lidija Topic, Deputy Foreign Minister, Ms Ljerka Maric, Minister of Finance and Treasury, Tanja Soljic and Minka Muftic, Sarajevo actresses) as well as members of international community (Paddy Ashdown the High Representative was the auctioneer) brought considerable media publicity and enhanced the effective communication with the target population and potential donors throughout the campaign.
- A majority of activities, including selection of premises and backstopping activities related to the campaign were done on a pro bono basis, with the full engagement and support of the Executive Board members, the Campaign Support Group formed by the organization, sponsors, and a large number of volunteers.
- The campaign and its key event - the Fashion Show and Auction - attracted new supporters both individuals and organizations that support the work of Bosnian Handicrafts (Vedrana Seksan, journalist, PRISTOP PR Agency).
- A corporate gift program that was successfully launched and contracts were signed with different state institutions that started a revenue source that continued throughout the year

Commentary

Even though the campaign achieved slightly less than the targeted ROI of 1.43, it was certainly seen as a success. The approach of the organization towards the fundraising was exemplary as it was very professionally implemented and addressed the development of internal organizational capacities and fundraising skills.

During the campaign twenty-three different media outlets featured a total of thirty-seven stories on Bosnian Handicrafts and its' work. In addition to media publicity, the distribution of promotional materials and direct communication efforts with the target group increased the visibility and awareness amongst the general public of the association and its' mission.

Description of Fundraising Campaigns

First Cycle of Campaigns June 1 - September 30, 2004

Name of CSO: *Obrazovanje gradi Bosnu i Hercegovinu Sarajevo*
Dobojska 4 Sarajevo
Tel/Fax: 00387 33 710 580/581
E-mail: ogbh@open.net.ba
www.ogbh.com.ba

Mission:

"Children victims of war - our permanent concern" - the Association provides moral and material support to child victims of war and talented and invalided children to achieve high levels of education and to become positive members of society.

Basic Organisational Facts

Type: Association

Management structure:

Seven-member management board with one executive director

Membership: 1,671 members

Staff Structure: One full time employee and 3 part-time employees

Offices and geographical coverage of activities:

One 178 m2 office in Sarajevo and activities throughout Bosnia and Herzegovina; and one 15 m2 office in Tuzla for activities implemented in the Tuzla Canton

Founding Date: Founded 27 July 1994

Description of FR Campaign

'Philanthropy for the future' is the slogan of the campaign implemented to raise funds from domestic sources for 50 new educational scholarships and to secure funding for summer camps for 100 orphans or children with only one parent.

Campaign funding

The organisation used 20,026.00 KM from a UMCOR/USAID grant to implement the fundraising campaign.

Summary of Fundraising Campaign:

The following table lists the different types of fundraising techniques planned and used during the implementation of the campaign and the corresponding financial inputs and outputs

	Campaign Component/ Technique	Anticipated Outcomes	Actual Outcomes	INPUT Monetary	OUTPUT Monetary
1	Membership Fee	58.000,00	7.220,00	2.228,00	7.220,00
2	Direct Approach		33.352,00	17.436,97	33.352,00
3	PR		1.032,00	490,00	1.032,00
4	Humanitarian Concert		3.110,00	964,28	3.110,00
5	Photo Auction		8.500,00	932,28	8.500,00
6	Paintings Auction		13.150,00	1.692,84	13.150,00
TOTAL				23.744,37	66.364,00

Result:

The campaign raised a total of 66,364 KM and therefore the Return-On-Investment was 2.79.

Campaign Highlights

- Successful mobilization of support of prominent BiH artists that donated their work (paintings and photographs) to the association for auction.
- The sale of 50 photographs from areas of conflict around the world donated by the prominent BiH photo-journalist, Damir Sagolj, who works for Reuters was one of the most successful techniques. Mr. Sagolj, hosted the art auction that included his work on 14 September 2004 in Sarajevo and 8,500 KM was raised from the auction. The event was not only financially important but highlighted the benefit of engaging high profile and respected personalities.
- The Association successfully increased their membership by 906 members and generating 12,220 KM in new membership fees.

Commentary

The goals of the campaign were exceeded and total of 66,364 KM was raised for 50 new scholarships and summer camps for 103 children.

During the campaign there were ninety-seven media citations about the work of the Association and the campaign that resulted from an extensive public relations effort using different PR techniques including: advertising (billboards, newspaper advertising, TV and radio jingles, posters); direct street campaigning (distribution of leaflets); and press conferences.

Description of Fundraising Campaigns

First Cycle of Campaigns June 1 - September 30, 2004

Name of CSO: *Sluh Mostar*

Dr Ante Starcevic 36 Mostar

Tel: 036 348 827

Fax: 036 348 828

E-mail: udruga.sluh@tel.net.ba

www.geocities.com/slhumostar

Mission:

The permanent care of deaf and hearing-impaired persons including services for medical treatment, employment, schooling and legislation, sign language interpretation, distribution of humanitarian aid and implementation of projects for the deaf and hearing-impaired persons.

Basic Organizational Facts

Type: Association

Management structure: Five-member Executive Board, three member Supervisory Board with one president of the association

Membership: 350

Staff Structure: Three full time employees

Offices and geographical coverage of activities:

One 35 m2 office in Mostar and activities in the Hercegovina-Neretva Canton, West Hercegovina Canton and Herzeg-Bosnia Canton

Founding Date: Founded in April 1955

Description of FR Campaign


"Let's Overcome Communication Barriers" was a slogan of the fundraising campaign to raise funds for: hearing aids (hearing devices and cellular phones) for members of the Association; equipment for the development of hearing and speaking. The campaign also aimed to educate the general public regarding the different types of obstacles that deaf and hearing impaired persons face in every day life.

Campaign funding:

The organisation used a 31,497.48 KM grant from UMCOR/USAID to implement the campaign.

Summary of Fundraising Campaigns:

The following table lists the different fundraising techniques planned and used during the implementation of the campaign and the corresponding financial inputs and outputs

	Campaign Component/ Technique	Anticipated Outcomes	Actual Outcomes	INPUT Monetary	OUTPUT Monetary
1	Advertising in Quarterly "Zvuk tišine"	 50,000,00	300,00	5.890,50	300,00
2	Direct Approach		11.618,00	5.713,28	11.618,00
3	Sale of T-shirts		3.405,00	7.971,50	3.405,00
4	CD with Sign Language		600,00	4.240,50	600,00
5	Theatre Event		1.200,00	1.110,50	1.200,00
6	Concert		895,00	2.536,20	895,00
7	Football Match		1.600,00	3.035,50	1.600,00
8	Neum 2004 annual gathering of members		50,00	999,50	50,00
TOTAL				31.497,48	19.668,00

Financial Results:

The campaign raised a total of 19,668 KM at a Return-On-Investment of 0.62

Campaign Highlights:

A Direct approach using direct mailing to more than 300 local businesses was the most effective technique used during the campaign. The direct mailing was later followed up by phone to each company and meetings were arranged to solicit further support.

Commentary:

While the campaign was not financially successful and had been very negatively affected when several key staff were seriously injured at a meeting of sister associations from the former Yugoslavia where a small bomb exploded, the Association gained very beneficial experience and enthusiasm for funding raising. As seen from the subsequent campaigns this experience and desire to succeed was effectively translated into positive fundraising results.

Description of Fundraising Campaigns

First Cycle of Campaigns June 1 - September 30, 2004

Name of CSO: *Žena BiH Mostar*
Trg Ivana Krndelja 3, Mostar
Bosnia and Herzegovina
Tel/Fax: 00387 36 550 339
E-mail: zenabih@cob.net.ba
www.zenabih.ba

Mission:

"Žena BiH" promotes human rights, economic independence, self-consciousness and the full inclusion of women in all aspects of life. "Žena BiH" plays an active role in a female peace movement working against all kinds of violence and that promotes gender equality.

Basic Organizational Facts

Type: Association

Management structure:

Seven-member Board of Directors with one Managing Director

Membership: N/A

Staff Structure: 23 full time employees and 20 volunteers

Offices and geographical coverage of activities:

One 105 m2 office in Mostar, different premises of a total of 1,130 m2 used for a daily care centre for elderly, a centre for women, a beauty centre and a safe house in Herzegovina Neretva Canton

Founding Date: 24 October 1994.

Description of FR Campaign

"Margarite ... She can be your sister, daughter, female friend" was the slogan of the fundraising campaign. The purpose of the campaign was to increase the awareness of the general public in BiH of the problem of human trafficking and also through the sale of a booklet with testimonies of victims of trafficking to generate an income to support the operations of a safe house for victims of trafficking that is run by the Association.

Campaign funding:

The organization used 30,060 KM from a UMCOR/USAID grant to implement the fundraising campaign.

Summary of Fundraising Campaigns: The following table lists the different fundraising techniques planned and used during the implementation of the campaign and the corresponding financial inputs and outputs

	Campaign Component/ Technique	Anticipated Outcomes	Actual Outcomes	INPUT Monetary	OUTPUT Monetary
1	Booklet Sale	50.000,00	21.372,00	26.860,00	21.372,00
2	Charity Event		4.800,00	3.200,00	4.800,00
TOTAL				30.060,00	26.172,00

Financial Result:

The campaign raised a total of 26,172 KM at a Return-On-Investment (ROI) of 0.87

Campaign Highlights:

- The public launch of the book, held in a building of various Federation BiH government institutions located on the informal line that divides 'east' and 'west' Mostar drew an extraordinary amount of attention from the general public, various NGO activists, the media and guests from other parts of BiH; and
- During the campaign there were 31 media citations about the work of the Association and the campaign that resulted from PR efforts that included: posters; direct street campaigning (road shows); a press conference; the public book launch, radio shows and TV reports.

Commentary:

The financial results of the campaign were below the set target. This is mostly to do with the Association's lack of experience in publishing - most of the campaign time was spent on preparation and publishing of the booklet itself. However, the campaign did contribute to an increased public awareness of the problem of trafficking not only in Mostar, but also in Sarajevo, Bihac and Modrica.

The publishing and fundraising experience gained by the Association will be beneficial for future efforts.

Description of Fundraising Campaigns

Second Cycle of Campaigns December 1, 2004 - January 31, 2005

Name of CSO: *Bosanske rukotvorine Tuzla*
Izeta Sarajlića 5, Tuzla, BiH
Tel/Fax: 00387 35 314 460/461
E-mail: office@bosnianhandicrafts.com
www.bosnianhandicrafts.com

Mission:

Through craft production and promotion, product design and educational activities Bosnian Handicrafts aims to provide both emotional support and a source of fair income for women of Bosnia and Herzegovina helping them to reconnect with their rich needlecraft heritage and set aside their differences.

Basic Organizational Facts

Type: Association

Management structure:

Nine-member management board with one managing director

Membership: N/A

Staff Structure: Seven full time employees

Offices and geographical coverage of activities:

A 150 m2 office in Tuzla, an office in Sarajevo and activities throughout Bosnia and Herzegovina

Founding Date: Established in 1995

Other:

A business arm of the Association for trade of handicrafts registered in 1999

Description of FR Campaign:

The second campaign aimed to: a) increase the income generation opportunities of project beneficiaries; and b). increase local communities' appreciation and understanding of the Association's the work and the importance of efforts to try to improve their beneficiaries' employment prospects. The fundraising techniques used were: a sponsorship campaign, a gala dinner, and the retail and wholesale sale of the handicrafts made by the Association network of socially vulnerable and marginalised women.

Campaign funding:

The organization used 19,839 KM from a UMCOR/USAID grant combined with 3,870 KM in private funds to provide a total of 23,709 KM for the campaign.

Summary of Fundraising Campaigns:

The following table lists the different fundraising techniques used during the implementation of the campaign and the corresponding financial inputs and outputs

	Campaign Component/ Technique	Anticipated Outcomes	INPUT Monetary	OUTPUT Monetary
1	Sponsorship	11.000,00	2.981,00	8.450,00
2	Gala Dinner	14.000,00	11.453,00	8.115,00
3	Retail and Wholesale	10.000,00	9.275,00	6.817,00
TOTAL			23.709,00	23.382,00

Financial Results:

The campaign raised a total of 23,382 KM at a Return-On-Investment (ROI) of 0.99.

Campaign Highlights

- The gala dinner that was used as a 'kick off' event at the start of the campaign proved to be very beneficial as it brought the campaign substantial publicity and improved the visibility of the campaign and for the Association.
- The campaign was specifically exploited to launch and increase the visibility of Association's new logo.
- 152 new beneficiaries (95% were previously unemployed) were engaged in handicraft production as a result of the campaign.
- Domestic sales were increased through the shops in Tuzla, Sarajevo and Biha? where according to a survey the number of domestic shoppers increased from 20% to 46.29% between January 2004 and January 2005.
- Campaign communication strategies were successful - 37 media citations (reports, references) during the two-month campaign including special reports on the work of the organization and interviews with the beneficiaries.
- Cooperation was established with three long-term partners: BH Eurosong, RTV FBiH and Sarajevo Winter (Festival?), and contacts established with numerous potential clients for the Association's corporate gift program.
- The number of supporters and advocates of the Association's work amongst BiH celebrities increased (e.g. new supporters included: Mirsad Tuka, the actor, the journalist Sabina Bačvić-Zečević, Vesna Andree-Zaimović, the Director of BH Eurosong and the music group Trio Feminem)

Commentary

Although the financial result was less than anticipated, the campaign successfully as contributed once again to the increased visibility of the organization and towards the efforts of the Association to assist their vulnerable beneficiary target group.

The campaign gave the Association opportunities to try new techniques and of particular note was the gala dinner that had its 'teething' problems but that convinced the organization to continue to use a special event technique for future campaigning due to its value not only as a fundraiser but more particularly a publicity 'getter' that has lasting effects beyond a specific campaign period.

Description of Fundraising Campaigns

Second Cycle of Campaigns December 2004 - January 31, 2005

Name of CSO: *Obrazovanje gradi Bosnu i Hercegovinu Sarajevo*
Dobojska 4 Sarajevo
Tel/Fax: 00387 33 710 580/581
E-mail: ogbh@open.net.ba
www.ogbh.com.ba

Mission:

"Children victims of war - our permanent concern" - the Association provides moral and material support to child victims of war and talented and invalid children to achieve high levels of education and to become positive members of society.

Basic Organizational Facts

Type: Association

Management structure:

Seven-member management board with one executive director

Membership: 1,671 members

Staff Structure: One full time employee and 3 part-time employees

Offices and geographical coverage of activities:

One 178 m2 office in Sarajevo and activities throughout Bosnia and Herzegovina; and one 15 m2 office in Tuzla for activities implemented in the Tuzla Canton

Founding Date: Founded 27 July 1994

Description of FR Campaign:


The purpose of the second campaign was to raise funds for 39 scholarships for child victims of war, invalid and talented children through the sale of calendars. This fundraising technique targeted businesses, governments and individuals.

Campaign funding:

The organization used 19,461.00 KM from a UMCOR/USAID grant to implement the campaign.

Summary of Fundraising Campaigns:

The following table lists the different fundraising techniques planned and used during the implementation of the campaign and the corresponding financial inputs and outputs

	Campaign Component/ Technique	Anticipated Outcomes	INPUT Monetary	OUTPUT Monetary
1	Calendar Sale - Contracts	19.500,00	12.193,00	22.680,00
2	Calendar sale Volunteers	15.000,00	7.335,00	14.358,00
3	Calendar Sale Sponsorship	4.500,00	472,00	5.500,00
	 TOTAL		20.000,00	42.538,00

Financial Results:

The campaign raised a total of 42,538.00 KM at a Return-On-Investment (ROI) of 2.13.

Campaign Highlights:

- Engaging the Association's beneficiaries (recipients of scholarships) in the sale of calendars proved to be very beneficial. It not only contributed positively to the sale of calendars, but it also gave beneficiaries the opportunity to play a pro-active role in the work of the Association that increased their shared sense of solidarity. The technique would undoubtedly have added to the authenticity of the Association's appeal for support and strengthened its' relationship with the community.
- The successful use of limited resources (the Association has only one full time and three-part time employees) combined good use of volunteers and other supporters to achieve a better than anticipated result.

Commentary

The ROI of 2.13 was an excellent result within a short campaign period and demonstrated the value of using an established product for promotional sales that exploited marketing mechanisms that had been developed and used previously. This is an example of a campaign technique that gradually becomes known or institutionalized in a market and shows a steadily improving result. The success of the campaign has enabled Education Builds BiH to increase the number of scholarships provided by 60% over a 12 month period (27 in 2003 versus 42 in 2004).

Description of Fundraising Campaigns

Second Cycle of Campaigns December 1, 2004 - January 31, 2005

Name of CSO: *Sluh Mostar*

Dr Ante Starčevića 36 Mostar

Tel: 036 348 827

Fax: 036 348 828

E-mail: udruga.sluh@tel.net.ba

www.geocities.com/slulmostar

Mission:

The permanent care of deaf and hearing-impaired persons including services for medical treatment, employment, schooling and legislation, sign language interpretation, distribution of humanitarian aid and implementation of projects for the deaf and hearing-impaired persons.

Basic Organizational Facts:

Type: Association

Management structure:

Five-member Executive Board, three member Supervisory Board with one president of the association

Membership: 350

Staff Structure: Three full time employees

Offices and geographical coverage of activities:

One 35 m2 office in Mostar and activities in the Hercegovina-Neretva Canton, West Hercegovina Canton and Herzeg-Bosnia Canton

Founding Date: Founded in April 1955

Description of FR Campaign:

Titled "Friends of Silence" this was the 2nd campaign implemented by Sluh Mostar aiming to continue to raise funds for the provision of different hearing aids for members and to purchase the equipment for the development of hearing and speaking that the Association was unable to afford following the previous campaign.

Campaign funding:

The organization used 17,839.00 KM from a UMCOR/USAID grant to implement the campaign.

Summary of Fundraising Campaigns: The following table lists the different fundraising techniques planned and used during the implementation of the campaign and the corresponding financial inputs and outputs

	Campaign Component/ Technique	Anticipated Outcomes	Actual Outcomes	INPUT Monetary	OUTPUT Monetary
1	Collection Box	6.000,00	3.968,00	6.647,00	3.968,00
2	Direct Approach	13.000,00	15.413,00	5.467,00	15.413,00
3	CD with Sign Language	8.000,00	1.795,00	5.725,00	1.795,00
			TOTAL	17.839,00	21.176,00

Financial Results:

The campaign raised a total of 21,176.00 KM at a Return-On-Investment (ROI) of 1.19.

Campaign Highlights:

- The Association focused on a less number of techniques (three) and achieved much improved results compared to the first campaign.
- Direct approaches proved once again the most successful technique for the Association. Their donor database was expanded to over 5000 entries (primarily businesses) as the Association succeeded to retain existing donors and to attract new ones.
- Although the first donation from 'Aluminij' d.d. Mostar (BiH's biggest export earner) of 5,000 KM occurred after the official end of the campaign, this was the highlight of the Association's campaigning efforts.
- The Association piloted a collection technique starting off with street collections as a tactic to raise general public awareness at a moment when the Association was celebrating its 50th anniversary later on replacing this with semi-permanent collection boxes in shopping centers in the Herzegovina area.
- Establishing and developing relations with different TV and radio stations (Federal TV, TV Liberty, RTV Mostar and BH Radio 1) further increasing visibility outside of their existing local community (the Mostar and Herzegovina area).

Commentary:

Hearing Mostar continued to use direct approaches and collections boxes after the campaign and have succeeded to win a steady revenue averaging 1,400 KM per monthly. The organization has stated that the opportunity to implement the fundraising campaigns has provided vital experience for the organization and staff, increased their sustainability outlook and their ability to assist members. The Association was appreciative of the educational forums where participating CSOS shared and exchanged ideas and fundraising experiences and results.

Description of Fundraising Campaigns

Third Cycle of Campaigns April 1 - June 30, 2005

Name of CSO: *Association of Citizens "Bona Fides" Bijeljina*
Skendera Kulenovića 20, Bijeljina, BiH
Tel/Fax: 00387 55 222 040/042
E-mail: bonafides@rstel.net
www.bonafides-bih.org

Mission:

Educating young people in democracy, human rights, tolerance and the universal values of a civil society making them able to actively participate in social, political, economic, cultural and other types of change.

Basic Organizational Facts:

Type: Association

Management structure:

Assembly, five-member Executive Board with one managing director and one president of the Assembly)

Membership: 160

Staff Structure: Five full time employees

Offices and geographical coverage of activities:

One 35 m2 and one 10 m2 offices in Bijeljina and activities in the municipalities of Bijeljina, Ugljevik and Lopare

Age of organization: 18 December 2001

Description of FR Campaign:

The purpose of the campaign "With the Strength of Children's Wishes Towards a Better Future" was to raise funds for scholarships for the secondary school education for 35 students without parental care from Bijeljina, Ugljevik and Lopare. Their main FR technique was selling a book titled With the Strength of Children's Wishes Towards a Better Future. Three other techniques used were the sale of postcards, a phone-a-thon and a direct mail effort.

Campaign funding:

21,660 KM from a UMCOR/USAID grant to implement the fundraising campaign.

Summary of Fundraising Campaigns

The following table lists the different fundraising techniques planned and used during the implementation of the campaign and the corresponding financial inputs and outputs

	Campaign Component/ Technique	Anticipated Outcomes	Actual Outcomes	INPUT Monetary	OUTPUT Monetary
1	Book Sale	24.500,00	1.460,00	14.424,00	1.695,00
2	Postcards Sale	1.000,00	74,00	2.016,88	74,00
3	Direct Mail	5.000,00	180,00	500,00	0,00
4	Phone-a-Tone	4.500,00	8.052,00	4.718,88	8.052,00
TOTAL				21.659,76	9.821,00

**Financial Results:**

The campaign raised a total of 9,821 KM and at a Return-On-Investment (ROI) of 0.45

Campaign Highlights:

- The Association approached a Sarajevo based graphic design company and secured pro-bono design services for the cover page of the Book and other promotional materials; and
- The phone-a-thon implemented with Telekom Srpske for a period of one month, which was included late in the day as an additional fundraising technique proved to be the Association's most successful technique.

Commentary:

Despite substantial and determined efforts by the Association the fundraising target was not achieved as the sale of the book as the key campaign technique proved to be too demanding for such a short campaign period. The lack of success for the book sales was partially due to probably unrealistic objectives and work planning combined with unsupportive local community that held a negative perception of the LNGO sector as being the recipients of foreign support.



Description of Fundraising Campaigns

Third Cycle of Campaigns April 1 - June 30, 2005

Name of CSO: *Centre for Development, Education
and Business "Humanitas" Doboj*
Vojvode Mišića 32, Doboj, Bosnia and Herzegovina
Tel/Fax: 00387 53 224 101
E-mail: humanitasbh@spinter.net
www.humanitas.org.ba
www.ekodoboj.org.ba

Mission:

Organization of constant actions for development and community stabilization, psychosocial support to children, employment activities, use of instruments of local economic development, development of democracy and justice, environmental activities, use of principles necessary for poverty reduction, self-sustainable return through basic civic norms and rights to work, protection of and contribution to the interest of youth, gender equality, humanitarian work and support to children.

Basic Organizational Facts

Type: Association

Management structure:

Five-member Executive Board with a President of Assembly

Membership: 127

Staff Structure: Two full time employees and 3 part-time employees

Offices and geographical coverage of activities:

One 50 m2 office in Doboj and activities throughout the Republic of Srpska

Founding date: 28 August 2003

Description of FR Campaign

The purpose of the campaign titled "For 500 Smiles" was to raise funds for 500 socially vulnerable children in twelve municipalities in Republika Srpska for the provision of direct aid. The beneficiaries were identified in cooperation with municipal Centers for Social Affairs.

Campaign funding:

The organization used 24,191 KM from a UMCOR/USAID grant to implement the fundraising campaign.

Summary of Fundraising Campaigns


The following table lists the different fundraising techniques planned and used during the implementation of the campaign and the corresponding financial inputs and outputs

	Campaign Component/ Technique	Anticipated Outcomes	Actual Outcomes	INPUT Monetary	OUTPUT Monetary
1	Phone-a-Tone	45.000,00	79.349,00	19.227,16	79.349,00
2	Direct Approach	6.000,00	4.800,00	4.963,84	4.800,00
			TOTAL	24.191,00	84.149,00

Financial Results:

The campaign raised a total of 84,149KM at a Return-On-Investment (ROI) of 3.48.

Campaign Highlights:

- The primary fundraising technique, a phone-a-thon, raised 79,349 KM (a ROI of 4.95) and dramatically exceeded the Association's expectations;
- The organization used aggressive, diversified, and systematic campaigning throughout the RS that did not slacken during the entire campaign period even after satisfactory results had been achieved in the first month. The PR techniques used included a self produced TV spot (620 appearances on 10 TV stations), a radio jingle (1,200 broadcasts on 20 radio stations), 10 press releases to 30 media houses, two TV shows (live presentations), a self produced documentary on the life of the marginalized and highly vulnerable, billboards in 10 towns, 1,300 posters in 15 towns, web presentation, approximately 10,000 e-letters, and two press conferences. The total number of media reports, references, and citations for the three-month campaign was 89;
- As substantially more funds were raised than planned, the Association was able to increase the number of direct beneficiaries assisted and the quantity of direct aid. 

Commentary:

Considering that Humanitas optimistically set a target ROI of 1:3, that was not only achieved but surpassed, their campaign was a standout financial success and adds to the suggestion that domestic fund raising initiatives can work.

HUMANITAS proved the importance of PR work, most of which was done from their office by contacting the media, placing information and preparing promotional material.

Description of Fundraising Campaigns

Third Cycle of Campaigns April 1 - June 30, 2005

Name of CSO: *HO Partner Banja Luka*
Beogradska 8, 78000 Banja Luka, BiH
Tel: 051-327-870
Fax: 051-327-871
E-mail: partner@teol.net
www.ho-partner.rs.sr

Mission:

"The mission of the organization is the socialization of marginalized groups, by working together as a team. We use individual approaches, estimation of abilities and we help the individual, both a user or help giver to use their capabilities to their maximum. The organization's work is based on the personal assistance service (third person care and support, transportation, rehabilitation, education and socialization of invalid persons)".

Basic Organizational Facts:

Type: Association

Management structure:

Assembly, five-member Executive Board with a Managing Director

Membership: 250 invalid persons, volunteers and experts

Staff structure: 7 full time staff members

Offices and geographical coverage of activities:

One office in Banja Luka implementing activities throughout BiH, and one office in Oštra luka implementing activities Oštra luka and Prijedor Municipalities.

Founding date: May 2001

Description of FR Campaign:

The purpose of the campaign "I do not stand, but I think, so I exist" was to raise funds for the continuation of personal assistance project for disabled persons (e.g. school transport, shopping assistance, etc.) and for the provision of direct aid to particular members in need.

Campaign funding:

The organization used 24,298 KM from a UMCOR/USAID grant combined with 3,430 KM in private funds to provide a total of 27,728 KM to implement the campaign.

Summary of Fundraising Campaigns:

The following table lists the different fundraising techniques planned and used during the implementation of the campaign and the corresponding financial inputs and outputs

	Campaign Component/ Technique	Anticipated Outcomes	Actual Outcomes	INPUT Monetary	OUTPUT Monetary
1	Phone-a-Tone	10.000,00	22.605,00	4.055,00	22.605,00
2	Direct Approach and Direct Mail	21.000,00	3.330,00	2.394,00	3.330,00
3	Handicrafts Sale	7.000,00	1.274,00	9.003,00	1.274,00
4	Collection Boxes*		945,90	7.183,00	945,90
5	Humanitarian Concert*		1.775,00	5.093,00	1.775,00
TOTAL				27.728,00	29.929,90

* Not originally planned

Financial Results:

The campaign raised a total of 29,929 KM at Return-On-Investment (ROI) of 1.08.

Campaign Highlights:

- The main technique used was humanitarian phone-a-thon which achieved a ROI of 5.57 raising 22,605 KM. The phone-a-thon lasted for 2 months and the number to dial was advertised through posters, radio jingles and TV ads. A TV appearance and appeal by representatives also proved a successful PR exercise as during and right after the TV program over 8,000 calls were registered.
- The campaign won the Association new donors and supporters and enabled it to expand activities to Prijedor Municipality
- Two of the techniques used in the campaign that did not prove to be successful in terms of ROI in the campaign period, i.e. handicraft sale and collection boxes have been successfully initiated and the organization includes these two techniques in their longer-term fundraising strategy. During the campaign the Banja Luka authorities allocated a place for a gift shop in Bana Milosavljevica Street, in the very center of Banja Luka to the Association. Also, the organization signed an agreement with the Tropic shopping centres to place the collection boxes in their premises. They plan to use the boxes in the future, as the high start-up investment to build the boxes will not be needed, whereas regular inputs will be relatively low and will possibly secure a more significant return for the organization.

Commentary

Although the handicrafts sale and the establishment of collection boxes that incurred high start-up costs were not successful during the campaign period these two ongoing techniques are anticipated to achieve better results as components of the Association's longer term fundraising strategy. Already during the campaign period the Banja Luka authorities allocated premises for a gift shop in Bana Milosavljevica Street in the very center of town and an agreement was signed with the Tropic shopping center company to allow collection boxes to be located in their shopping centres.

Despite not achieving an overall ROI of 1.5, the Association evaluated the campaign as an organizational success as it was the first experience of this type of fundraising. As a challenge it was a positive effort that clarified that internal organizational capacities needed strengthening with a special emphasis on staff training for PR and marketing. The organization plans to continue fundraising activities through the production and sale of gift products, use of collection boxes and the organization of various special events.

Description of Fundraising Campaigns

Third Cycle of Campaigns April 1 - June 30, 2005

Name of CSO: *Association of Parents of Children and Youth with Special Needs "Sunce nam je zajedničko" Trebinje*
Sjeverni logor bb
Trebinje
Bosnia and Herzegovina
Tel/Fax: 00387 59 261 096
E-mail: sunce.tb@teol.net
www.urdopp.org

Mission:

The Association "The Sun Belongs to All", in cooperation with parents and experts supports children and youth with special needs to develop their own potential aimed at smoother and faster integration in communities.

Basic Organizational Facts:

Type: Association

Management structure:

Seven member Executive Board, three member Supervising Board with one Managing Director

Membership:

91 children and youth with special needs, 170 parents and 15 experts

Staff structure: Seven full time employees and 4 part-time employees

Offices and geographical coverage of activities:

One 16 m2 office in Trebinje and activities in the Trebinje Municipality area

Founding date: 1 July 1998

Description of FR Campaign

The purpose of the campaign "Hands and Creativity Can Do Everything" was to raise funds for provision of a vehicle for transportation of children to the daily center organized for 89 children and youth with disabilities in Trebinje, as well as direct aid to members in need.

Campaign funding:

The organization used 14,080 KM from a UMCOR/USAID grant to implement the campaign.

Summary of Fundraising Campaigns:

The following table lists the different fundraising techniques planned and used during the implementation of the campaign and the corresponding financial inputs and outputs

	Campaign Component/ Technique	Anticipated Outcomes	Actual Outcomes	INPUT Monetary	OUTPUT Monetary
1	Handicrafts Sale	5.000,00	2.233,00	3.924,61	2.233,00
2	Folklore Show	3.600,00	2.346,00	3.121,50	2.346,00
3	Theater Performance	2.800,00	469,00	1.287,00	469,00
4	Charity Dinner	5.500,00	5.800,00	2.017,00	5.800,00
5	PR*		2.000,00	730,13	2.000,00
6	Direct Approach	5.000,00	9.869,00	3.000,00	9.869,00
TOTAL				14.080,24	22.717,00

* Not originally planned

Financial Results:

The campaign raised a total of 22,717 KM at a Return-On-Investment (ROI) of 1.61.

Campaign Highlights:

- A particular feature of the whole campaign was the comprehensive support engendered from the Trebinje community at large (government, non-governmental organizations, business sector, and individuals);
- A special charity event dinner was organized at the very start of the campaign. The dinner was very well organized and well attended by representatives of the cultural, political and economic life of Trebinje and it succeeded to attract good at the outset of the campaign;
- Despite using 4 demanding fundraising activities (special events) within a very short period of time all the activities succeeded through a combination of strong teamwork and good coordination of activities between staff and a committed group of volunteers.
- The effectiveness of the Association's PR work lead to two donations of 2,000 KM from former residents of Trebinje living abroad.



Commentary

This was a successful campaign that met all of its objectives. The results of the campaign suggest that domestic fundraising in BiH can work not only in the larger urban centers, but also in smaller towns and communities.

Description of Fundraising Campaigns

Third Cycle of Campaigns April 1 - June 30, 2005

Name of CSO: *Union of Associations of Blind Citizens of Tuzla Canton Tuzla*
Stupine B8, Lamela 5/3, Tuzla, Bosnia and Herzegovina
Tel/Fax: 00387 35 253 330
E-mail: ssgtk@inet.ba

Mission:

"Gathering blind and other interested persons and coordination of activities regarding improvement of the life of the blind".

Basic Organizational Facts:

Type: Union of Associations

Management structure:

Five-member management board with one secretary as a leader of the organization

Membership: Five municipal associations

Staff structure: Three full time employees and 2 part-time employees

Offices and geographical coverage of activities:

One 47 m2 office in Tuzla and activities throughout the Tuzla Canton and Bosnia and Herzegovina

Founding date: 12 July 1995


Description of FR Campaign

The purpose of the campaign "Light in the Eyes of the Blind" was to raise funds for the provision of technical devices for 185 members of the Union of Associations to improve the quality of life and educational opportunities of blind citizens.

Campaign funding:

The organization used 24,827 KM from a UMCOR/USAID grant to implement the campaign.

Summary of Fundraising Campaigns:



	Campaign Component/ Technique	Anticipated Outcomes	Actual Outcomes	INPUT Monetary	OUTPUT Monetary
1	Humanitarian Concert	28.000,00	19.420,00	16.028,00	19.420,00
2	Phone-a-Tone	15.000,00	1.014,00	5.286,00	1.014,00
3	Direct Approach	5.000,00	2.920,00	3.513,00	2.920,00
			TOTAL	24.827,00	23.354,00

Financial Results:

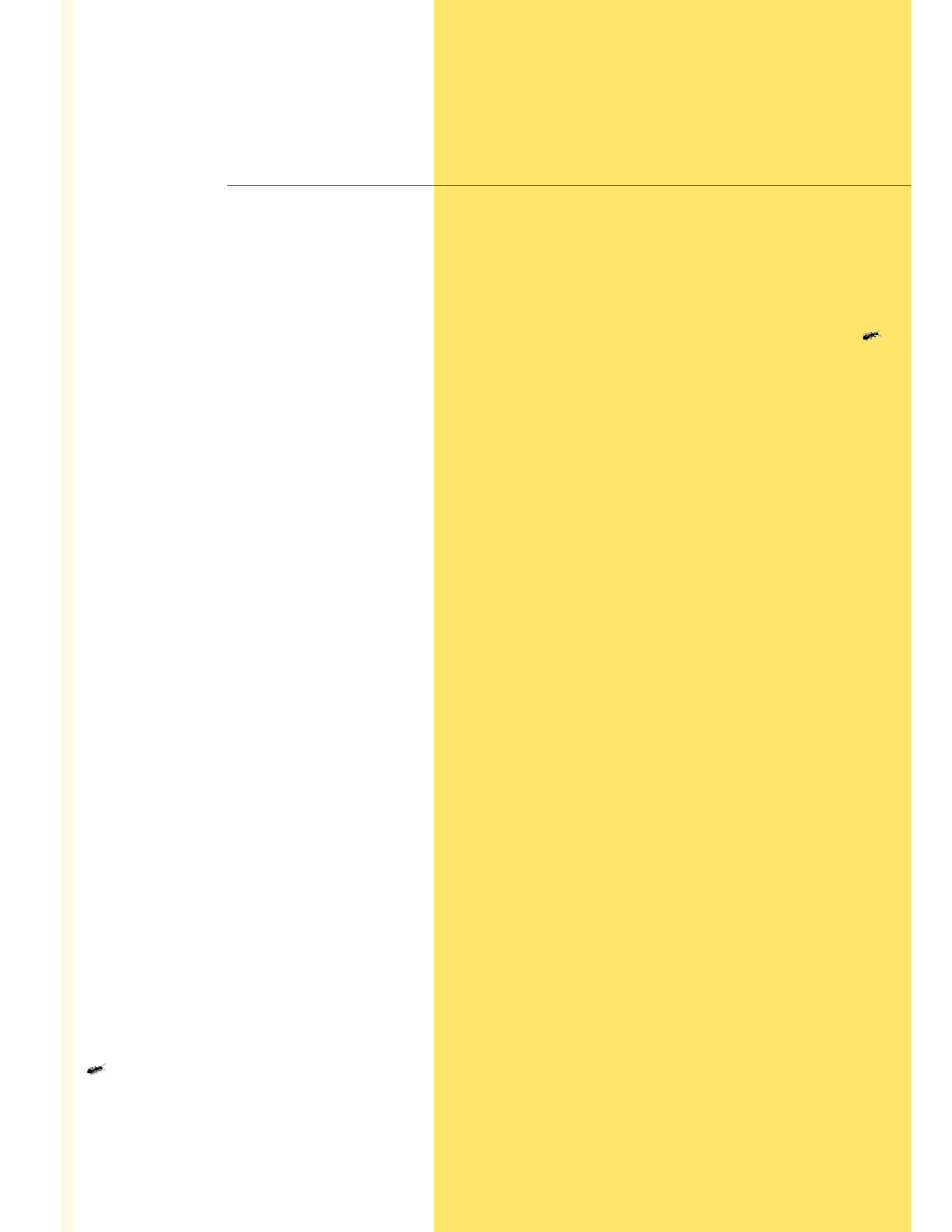
The campaign raised a total of 23,354 KM at a Return-On-Investment (ROI) of 0.94.

Campaign Highlights:

- The main technique or event was a humanitarian concert that was very well organized and attended by a large audience of over 3,500.
- Using the campaign proceeds the Union procured and delivered one hundred and forty three MP3 players for their members

Commentary:

Although the concert raised less than planned it was still a profitable exercise achieving a ROI of 1.21, but an arguably more important output was the size of the audience that attended and the opportunity this presented for the Union to win new supporters. The decision to use professional concert organisers proved a wise one and is recommended to all CSO contemplating such complex and large scale events. After such an initial success the results of the phone-a-thon and the direct approach were more modest but certainly used by the Union as learning experiences.



Template Worksheets

Worksheet 1

10 Steps in Strategic Planning Process

- Strategic planning is "...a systematic process through which an organization agrees on-builds
- commitment among key stakeholders to-priorities which are essential to its mission and responsive to its operating environment."²¹

Step 1: Establish a Planning Committee

Create a planning committee and draft its mandate; Define who should be involved in the planning process (representing what key stakeholders, i.e. Board of Directors, Executive Director, Management Team, staff, volunteers, current clients, past clients, donors, community representatives, others)

Step 2: Express a Vision

Dare to dream the possible! What is your organization's realistic but challenging guiding vision of success? External vision: Describe how the world would be improved, changed, or different if your organization was successful in achieving its purpose.

Step 3: Define Your Mission

What is the *focus problem(s)* that your organization exists to solve? What is the *purpose* of our organization (answers the question of why we exist, does not describe what we do)? What is your business? What are the *fundamental values and beliefs* that should guide you in your day-to-day interactions with each other and your constituencies? What are the *major assumptions* upon which our organization provides its services? What are the *guiding values and philosophies* that impact how the organization does its program, strategies, resources, and organizational operations.

Your Mission Statement (Combine the information above to create a compelling mission statement (**two or three** sentences) about *who* the organization is, what the organization does, and why the organization does it.)

Step 4: Develop Community Profile

Conduct basic research, mostly through secondary data review, summarizing the basic challenges of the community that your organization may be in a position to address. In general this section should include: your organization's history and profile, indicators of basic needs, overview of economic, social and political trends, summary of the needs that exist that may be addressed by your organization's key program areas.

21 - Michael Allison, Strategic Planning for Nonprofit Organizations. 1997:1

Step 5: Assess and Understand Stakeholders

Who are the *stakeholders* that are important to your organization (organizations, beneficiaries, partners and donors interested in, or otherwise affected by your program(s)). The purpose of this step is to identify key stakeholders, better understand their ability to influence your organization as well as to understand their opinion of your organization. This information can be summarized in the table below and is obtained through internal brainstorming sessions and in-person meetings with your various stakeholders.

Stakeholder	Performance criteria (What does the stakeholder value?)	Your organization's performance (Your sense of their opinion) - Very Good, - OK, - Poor	How do they influence your organization?	What does your organization need from them?	How important are they? - Extremely - Somewhat - Not very - Not at all	Potential strategies for obtaining support or reducing obstacles

Step 6: Develop and Analyze SWOT (Strengths, Weaknesses, Opportunities, Strengths)

Identify your organization's internal strengths and weaknesses, and external opportunities and threats. Be sure to incorporate stakeholder and donor opinions into your SWOT and not only staff opinions. The purpose of this step is to determine what activities your organization should invest in to get better and what activities should be reduced or replaced. These are identified during this process by analyzing comparative advantages and disadvantages. This step also identifies the primary strategic issues facing the organization that need to be addressed.

Internal Forces		External Forces	
Strengths		Opportunities	
•		•	
•		•	
•		•	
•		•	
•		•	
Weaknesses		Threats	
•		•	
•		•	
•		•	
•		•	
•		•	

Step 7: Develop Strategies

During this step a list of general strategic directions for your organization to follow over a given period of time will be developed. The list is divided into three areas:

- I. **Program/Service Delivery Strategy** - clear statement of what the organization wants to accomplish with its programs in a given period of time. It should be achievable and based on the community profile (needs) combined with an assessment of the resources available (donor scan). Program strategy is always developed first and should then drive the development of funding and capacity building strategies.
- II. **Funding Strategy** - these are the critical activities that the organization will need to undertake in order to pay for your activities/programs to achieve your desired impact. Donor development strategies should include a target and be time bound (i.e. Secure at least 50,000 KM from by May 2006) with a description of activities that will have to be undertaken to achieve this strategy - FUNDRAISING CAMPAIGNS WILL BE THE METHOD TO ACHIEVE YOUR FUNDING STRATEGY
- III. **Organizational Development/Capacity Building Strategy** - these are the steps your organization will need to take to build or ensure it has sufficient capacity to execute your program/service delivery and funding strategies.

Step 8: Write Your Strategic Plan

This step involves pulling together all of the outputs achieved during Steps 1 to 7 and describing them in one concise document. Generally writing your strategic plan is done by your lead planner or the executive director of your organization.

Step 9: Develop an Annual Plan Implementation Chart

The annual plan implementation chart simply helps to 'operationalize' your Strategic Plan on an yearly basis. It clarifies who will do what, when and with whom. The chart becomes a part of your Strategic Plan document.

For example:

Major results area 1: Program	Area of Responsibility:							FY 0_ Months											
	Key: Lead = X; Implementer = 0; Start = S; End = E; On-going = OG																		
STRATEGIC GOAL 1.	Director	Staff 1	Staff 2	Staff 3	Staff 4	Staff 5	Staff 6	1	2	3	4	5	6	7	8	9	10	11	12
Strat Objective 1.1																			
Critical Activities:																			
Strat Objective 1.2.																			
Critical Activities:																			
STRATEGIC GOAL 2.																			
Major Results Area 2: Fundraising																			
Strat Objective 2.1																			
Critical Activities:																			
Strat Objective 2.2																			
Critical Activities:																			
Major Result Area 3: Capacity Building																			
Strat Objective 3.1																			
Critical Activities:																			
Strat Objective 3.2																			
Critical Activities:																			

Step 10: Evaluation

An outline of the process for periodically evaluating and adjusting the your Strategic Plan. What are the key milestones and who will be involved in evaluating what has been accomplished? What will change in your future plans?



Worksheet 2

Three-Year Financial Strategy

- It helps the organization be driven by the mission and focused on the community needs
- It helps the organization set priorities and focus on long-term purposes
- It creates a framework for financial and fundraising activities of the organization

	2006		2007		2008	
Public funding	Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
Government (state/entity/canton)						
Local government (municipal)						
Private funding	Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
Foundation						
Companies						
Individuals						
Own income	Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
Membership						
Service fees						
Income generation						
Bank interest						
Total	Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
Grand Total per Year	2006		2007		2008	

Worksheet 3

Fundraising Target Projections

- Estimate the financial resources your organization requires to support your annual strategic plan.

Expected Revenue in 2006

Expected Expenses in 2006

Grants:

Program Costs:

KM _____

KM _____

Other income:

Support Costs:

- Service Fees
- Membership Fees
- Bank interest
- Other _____

KM _____

Total revenue:

Total expenses:

KM _____

KM _____

Revenues - Expenses = Surplus/Deficit

Deficit = Fundraising Target

Worksheet 4

Fundraising Calendar²²

- Review your choices and make timing adjustments
- Determine an optimal work flow and operations within the cash flow limitations imposed by your organization's finances
- Determine critical months when the organization will need support of extra staff and/or volunteers

Months														
Fundraising Technique		January	February	March	April	May	June	July	August	September	October	November	December	Total from the technique
Technique 1	Activities													
	Income goal													
Technique 2	Activities													
	Income goal													
Technique 3	Activities													
	Income goal													
Total Planned To Be Raised Per Month														
Grand Total Planned To Be Raised From ALL Techniques														

22 - Adapted from M. Warwick and S. Hitchcock. Ten Steps to Fundraising Success: Choosing the Right Strategy for Your Organization, 2002: 96-97.

Worksheet 5

A Sample of Campaign Feasibility Questionnaire

- Determine community's perception of the importance of the need for which money is to be raised
- Feelings, both positive and negative about the organization and its mission
- Size and availability of the potential donor base and its ability to give
- External factors that could influence the outcome of the campaign

Individual Interviewed _____ Date _____

1. How long have you lived in (Community)? _____

2. On a scale of 1 to 10, with 10 as the most, how familiar are you with (Organization)? _____

3. What do you know about the (Organization's)?

- Mission
- Leadership
- Role in the Community
- History
- Staff
- Other

4. What do you see as _____ (Organization's) strengths?

5. What, if any, do you see as potential areas for improvement for _____ (Organization)?

6. How do you respond to the organization's proposed fundraising campaign and its cause (as defined in the 'Concept of the Campaign')?

____ Understand and accept the need for the campaign as stated.

____ Have questions about the need for the project as stated. Explain:

7. What priority in terms of community need would you place on the proposed campaign and its cause?

High____ Moderate____ Low____

8. What priority in terms of community need would you place on (Organization's Mission)?

High____ Moderate____ Low____

9. What is your impression of _____ (Organization's) financial condition?

10. (If interviewee is a current or former donor to the organization) What makes you feel good about your financial support of _____ (Organization)?

11. What do you see as the most compelling reason for the community to support the campaign?

12. Do you know of any previous major fund-raising campaigns for any purpose addressing this area of need?

13. What is your impression of the philanthropic spirit and understanding of the fund-raising process in _____ (Community)?

(Present the interviewee with anticipated results of the fundraising campaign)

14. Do you believe the financial goal of the campaign to be attainable?

___Yes ___No

If no, why not? _____

15. Do you believe support at these levels can be secured? ____ If not, at what levels do you suggest?

16. What challenges to the success of the campaign do you think might exist?

17. How would you describe the traits needed for the ideal leader or leaders for the campaign?

18. Can you name people (and their positions in the community) who fit that description?

1. _____
2. _____
3. _____
4. _____
5. _____

Who of these would be the strongest?

Why? _____

19. Who do you think would be the best donors to approach in the community?

Donor	Best Person To Approach The Donor
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____

20. Are you aware of any other current or planned fund-raising campaigns that might compete with the (Organization's) campaign?

21. Are there persons, organizations, groups, foundations, government officials, etc. whose endorsement you would see as important to the success of the campaign?

Please comment on any points not covered that you feel are important for the (Organization) to consider as it prepares for its campaign.

Thank you.

Worksheet 6

Fundraising Campaign Proposal

- Define your activities, resources and allocate responsibilities
- Ensure you have considered all aspects of the implementation of the campaign
- If necessary, review your core strategies and long-term and short-term priorities.

(FR = Fundraising, PR = Public relations)

Title / Slogan of the proposed campaign:

Proposed Implementation Period:

1. **Campaign background** *(how does the proposed campaign fit or contribute to your overall fundraising strategy and organizational development; relevant research that the proposed campaign is based upon regarding the community awareness of your issue, current state of affairs, visibility of your organization, key organizational strengths and weaknesses, cooperation and networking with other organizations that work on the same issues):*

2. **Problem statement** *(description of the need for the intervention of your organization):*

3. **Overall goal of the campaign** *(the change that your campaign will affect to address the need, how will the campaign results contribute to the issue you are seeking to address):*

4. **Purpose of the campaign** *(what specific uses the funds raised will be used for and how these will affect the your direct beneficiaries):*

5. **Direct beneficiaries of the campaign**

5.a **Criteria for selection of direct beneficiaries**

6. **Key campaign fundraising technique** *(Clearly define what will be your key technique and how this will raise funds. e.g. organize a concert in a venue with the capacity for 2,000 persons, spend 3,500 on the costs of the concert, sell 1,500 tickets for 5 KM each and generate an income of 7.500 KM where 4,000 KM is profit):*

7. **Other campaign fundraising techniques (describe as previous):**

8. **Expected results** *(use the table to estimate the resources needed (both financial and in-kind) to implement the planned technique and the anticipated return on investment per technique (both financial and in-kind)/*

		Needed resources - inputs		Expected results - outputs	
		In-kind	Monetary	Monetary	In-kind
1	FR Technique 1				
2	FR Technique 2				
3	FR Technique 3				
4*	PR				
	Total				

*In Row 4. (PR Total) include the amounts estimated in the table below under Item 11. row 4. column 3.). The total of Column 3. is the amount of funds invested in the campaign and it should be equal to the Column 6. of the Campaign Budget.

9. Resources required for the implementation of FR campaign:

9.a. Human resources

FR technique 1	FR technique 2	FR technique 3

9.b. Material resources

FR technique 1	FR technique 2	FR technique 3

10. PR techniques and types of communication to be used:

		Needed resources - inputs		Expected results - outputs	
		In-kind	Monetary		
1	Technique 1				
2	Technique 2				
3	Technique 3				
4				*	
	Total				

* In Column 4. describe the expected results regarding visibility of your organization and the campaign. Results should be measurable e.g. # of

media citations, # of media representatives attending your events, duration of the show, # of persons that have heard about the campaign and/or responded to it, etc.

11. Resources required for implementation of PR campaign:

11.a. Human resources

PR technique 1	PR technique 2	PR technique 3

11.b. Material resources

PR technique 1	PR technique 2	PR technique 3

12. Campaign communications plan *(describe the how your organisation plans to communicate to the target audience, e.g. radio announcements, posters, TV reports, etc.):*

-
-
-

13. Potential sources of funding that will be approached *(identify your anticipated funding sources according to categories - business sector, public sector, individuals):*

14. Staff engaged in the campaign:

Name and surname	Employed in the organization YES / NO	Function in the campaign

15. Activity plan *(prepare a detailed timeframe for all activities):*

16. Campaign budget

(plan the funds needed for the implementation of the campaign):

No	Budget Item	Unit type	No of units	Unit price	Total
A.	Administration and Operational Costs				-
I.	Staff (salaries and wages)				-
I.1				-
					-
II.	Fringe benefits for staff				-
II.1				-
2					-
III.	Travel				-
III.1				-
2					-
IV.	Office equipment (maintenance and repair)				-
IV.1				-
2					-
V.	Office supplies				-
V.1				-
2					-
VI.	Communication (phone, fax, Internet)				-
VI.1				-
2					-
VII.	Office rent				-
VII.1				-
2					-
VIII.	Bank fees				-
VIII.1				-
2					-
3					-
					-
Total A					-
B.	Direct Program Costs - Costs for Campaign Implementation				-
I.				-
I.1					-
2					-
II.				-
II.1					-
2					-
III.				-
III.1					-
2					-
3					-
Total B					-
TOTAL A+B					-

Staff Planning

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Worksheet 8

Sources of Funds

- Determining the readiness of different funding sources (sectors) to support the work of your organization
- Basis for development of fundraising strategy and selection of particular fundraising techniques
- Collating the data on donor/potential donor sources

		Location	Approached on	How (fax, mail, letter visit, etc.)	Follow up	Monetary contribution in KM	In kind contribution (specify)	Monetary contribution (value in KM)	Negative response	Supported organization before this campaign
A	Bussiness Sector									
1.										
2.										
3.										
						0	Total A	0		
B	Government									
1.										
2.										
3.										
						0	Total B	0		
C	Individuals									
1.										
2.										
3.										
						0	Total C	0		
D	Foundations, Organizaztion, Institutions									
1.										
2.										
3.										
						0	Total D	0		
						0	Total A+B+C+D	0		

Worksheet 9

Sample Business Plan

- Help organizational and operational planning
- Clarify the idea and its applicability
- Define the market and feasibility of the plan
- Help in looking for funding

1. Description of the Organization

Present the organization/company and its objectives, short history of the organization/company if it already exists and its current status. Important to include:

- Development of organization/company, its purpose, and legal basis
- Sources of capital used in establishment of the organization/company
- Management structure of the organization/company, qualifications and experience
- Current status - overview of organization/company activities, turnover, revenue and number of employees

2. Description of Products or Services

Here describe product(s) or services that you offer or plan to offer from the point of view of the market rather than focusing on technical details. Real data and numbers are necessary to show that the products or services are competitive. If they are available use independent tests to determine the quality of your product or service. Relevant data is more useful than general statements. It is vital to address at least:

- Precise description of product or service
- Function and usefulness
- Competitive advantage
- Uniqueness
- Quality and independent sources that support quality assessment

3. Market and Competition

Show that there is relevant market for your product or service. Define your clients or customers, determine the size of the market, potential market share and potential growth. Define the competitiveness of your product or service within the target market. Reference and provide sources for your data and numerical information to increase the credibility of data offered.

4. Marketing

Explain how you plan to inform clients or customers about your products or services and how you plan to make your products or services available.

It is necessary to cover the following topics:

- Define your buyer
- How will you inform them about the existence of your product or service
- Methods of distribution
- Types of sales
- Methods to attract your buyers
- How to motivate the sales staff
- Prices of products or services

5. Production process

This section focuses on the production process or service delivery. If your organization is production oriented you need to describe the production process from the sourcing of raw material, to production methods and distribution. In addition to the central production cycle it is advisable to provide a description of other components such as information system, accounting system, management of human resources, etc.

This part should also describe your planned growth from initial production or service provision to the full capacity.

Also describe all facilities and equipment required for production or service provision

6. Organizational plan

Plan all key tasks for production or service delivery process and define organizational and management structure. Include staffing plans, requirements for each position (experience, qualifications and job descriptions), criteria for their selection, perspectives for their future development and remuneration scales (salaries and benefits).

7. Impact on environment

Whenever possible it is ideal to define possible environmental impacts of the production process or service provision. If you determine that there may be negative environmental impacts then your organisation should strive to resolve these.

8. Financial plan

If you have achieved a financial result in the past the planning process should start by acknowledging this result. Present this with other financial data from your organization to plan financial growth of your product or service delivery. It is useful to develop three types of financial planning models: a pessimistic; a relative; and, an optimistic model. The core of your financial plan will be:

1. Report/projection of gain/loss
2. Cash flow projection
3. Balance sheet

9. Annexes / Supporting documents

Your business plan should include the basic documents that support conclusions and projections. These include (where possible):

- Market research (either as a result of your own or other agency's research)
- Catalogues, photographs or drawings of your product or services
- Test results of the selected products, approvals or requests for the service that you offer
- Details of any preliminary contracts for provision of products and services
- Rental agreements
- Pricing policy
- Reconstruction plans
- Business registration

10. Project Synopsis

A project synopsis or executive summary is key to completing your business plan. The basic facts about your business activities need to be stated here. It is recommendable for your synopsis to be brief, one or two pages at the most, and to be completed as a last step in the development of your business plan that brings the plan together. The aim is to present a convincing case of your organisations purpose and the strategy that will lead to its accomplishment. This synopsis can then be used both internally and externally as you strive to achieve the business.

Worksheet 10

Fundraising Techniques Overview

- Follow up of investment and return on investment per a fundraising technique
- Assessing efficiency and effectiveness of fundraising techniques



	Input Type			FR technique	Output Type		
	In kind		Monetary		Monetary	In kind	
Source (who contributed) before the campaign	Type of input (service, material - specify)	Monetary Equivalent	From XXX				Source (who contributed) after the campaign
	Subtotal 1						
	Subtotal 2						
	Subtotal 3						
Total per columns							Total per columns
Total input							Total Output

Legend

FR technique 1
 FR technique 2
 FR technique 3



Worksheet 11

Media List

- To follow readiness of media to support your work - a basis for development of your strategy for working with media

Media	Location	Phone number	Fax number	E-mail	Website	Contact person	Details of Media Coverage About the Organization or Campaign				Press Clipping Available in Your Archive (Yes/No)	Note
Print Media							Date	No	Page(s)	Title		
Total Coverage for Print Media							XXX					
Radio							Date and Hour	Radio Program				
Total Coverage for Radio							XXX					
TV							Date and Hour	TV Program				
Total Coverage for TV							XXX					
WEB												
Web site	Contact person's phone	Contact person's e-mail	Web Address	Period when reported @ web site	LINK to the Citation on the Organization							
Total Web Coverage							XXX					



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Anex 1

List of the Top 100 Companies in BiH for 2004

1. JP ELEKTROPRIVREDA BiH d.d. Sarajevo
2. BH TELECOM d.d. Sarajevo
3. ELEKTROPRIVREDA RS AD Trebinje
4. ALUMINIJ d.d. Mostar
5. TELEKOM SRPSKE Banja Luka
6. ENERGOINVEST d.d. Sarajevo
7. JP ELEKTROPRIVREDA HZ HB Mostar
8. VOLKSWAGEN Vogošća
9. HOLDINA d.o.o. Sarajevo
10. ASA AUTO d.o.o. Sarajevo
11. HRVATSKE TELEKOMUNIKACIJE d.o.o. Mostar
12. MITTAL STEEL ZENICA Zenica
13. PREVENT SARAJEVO d.o.o. Visoko
14. HIDROGRADNJA d.d. Sarajevo
15. KLAS d.d. Sarajevo
16. RUDNICI KREKA d.o.o. Tuzla
17. GRUPACIJA MIMS d.o.o. Sarajevo
18. BH GAS d.o.o. Sarajevo
19. FABRIKA DUHANA SARAJEVO Sarajevo
20. ERONET Mostar
21. COCA COLA HBC B-A d.o.o. Sarajevo
22. JP BH POŠTA Sarajevo
23. ŽELJEZNICE FEDERACIJE BiH Sarajevo
24. IK KRIVAJA Zavidovići
25. MERKATOR BH Sarajevo
26. BOSNALIJEK Sarajevo
27. TVORNICA CEMENTA Kakanj
28. SARAJEVO OSIGURANJE Sarajevo
29. MEPAS Široki Brijeg
30. PODRAVKA Sarajevo
31. JU APOTEKE Sarajevo
32. SARAJEVSKA PIVARA Sarajevo
33. RUDNIK MRKOG UGLJA Kakanj
34. AKOVA IMPEX Hadžići
35. BOSNA REOSIGURANJE Sarajevo
36. KJKP GRADSKI SAOBRAĆAJ Sarajevo
37. FABRIKA CEMENTA Lukavac
38. AS Tešanj

39. ECONOMIC Vitez
40. KJKP VODOVOD I KANALIZACIJA Sarajevo
41. LORA Sarajevo
42. FEAL Široki Brijeg
43. GP PUT Sarajevo
44. CROATIA OSIGURANJE Ljubuški
45. NTCHS Sarajevo
46. JAVNI RTV SERVIS BiH Sarajevo
47. KAPIS Tomislavgrad
48. GRAFOTISAK Grude
49. UNSKO-SANSKE ŠUME Bosanska Krupa
50. SARAJEVSKI KISELJAK Kiseljak
51. LUTRIJA BiH Sarajevo
52. MEĐUNARODNI AERODROM Sarajevo
53. VEGAFRUIT Doboj-Istok
54. TRIGLAV BH OSIGURANJE Sarajevo
55. MEGGLE MLJEKARA Bihać
56. FINVEST Drvar
57. HF TROPLAST BOSNA Živinice
58. POSLOVNI SISTEM CIMOS Gradačac
59. STANDARD Sarajevo
60. EL TARIK OIL Sarajevo
61. HERCEGOVINA OSIGURANJE Mostar
62. CENTROTRANS EUROLINES Sarajevo
63. UNIKO FILTERI Tešanj
64. VRANICA Sarajevo
65. EUROHERC OSIGURANJE Mostar
66. SOLANA Tuzla
67. BIRA Bihać
68. HIFA Tešanj
69. VITAMINKA Banja Luka
70. VELPRO Sarajevo
71. HERCEGOVINAVINO Mostar
72. ŠIP STUPČANICA Olovo
73. RAIFFEISEN OSIGURANJE Sarajevo
74. KOLINSKA Sarajevo
75. OLIP BOSNA Travnik
76. GP BOSNA Sarajevo
77. SCONTO PROM Prijedor
78. BOSNA OSIGURANJE Sarajevo
79. SARAJEVO ŠUME Sarajevo
80. BOBOTA Čitluk
81. METALNO Zenica
82. HERCEG Srebrenik
83. BEKTO INTERNATIONAL Goražde
84. UNITIC Sarajevo

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85. METALMERC Kiseljak
 86. ŽAD Karakaj
 87. SUNCE BH OSIGURANJE Livno
 88. AD ALPRO Vlasenica
 89. VGT OSIGURANJE Visoko
 90. GRAWE OSIGURANJE Sarajevo
 91. ŽICA Sarajevo
 92. REMONT MONTAŽA Tuzla
 93. LASER Pritoka-Ripač
 94. LIDO OSIGURANJE Tuzla
 95. HOLIDAY INN Sarajevo
 96. PLAMINGO Gračanica
 97. KOTEKS Tešanj
 98. METALOTEHNA Tuzla
 99. WELTPLAST Posušje
 100. DOBOJPUTEVI Doboj Jug



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